

BILLMASTER™

USER'S MANUAL

Customized Business Software, LLC

Copyright 1986-2015 All Rights Reserved.

INSTALLATION	1
OVERVIEW	1
CREATING A COMPANY	5
JOB DESCRIPTIONS	9
NEW ACCOUNT INFORMATION.....	12
<i>VIDEO - Create Account</i>	<i>12</i>
<i>VIDEO - Create Account – Pest Control</i>	<i>13</i>
CHARGING YOUR CUSTOMERS	14
<i>VIDEO – Transactions.....</i>	<i>14</i>
MAIN MENU – NAVIGATION	16
<i>VIDEO – Main Menu Navigation</i>	<i>16</i>
COMPANY INFORMATION	16
ACCOUNT INFORMATION.....	17
ROUTE SELECTION, ADDITIONAL FUNCTIONS	18
SEARCH, ADDITIONAL FUNCTIONS	20
MAIN MENU – FUNCTION SELECTION	21
MAIN MENU – SELECTING ACCOUNTS	22
MAIN MENU – SELECTING ACCOUNT – RIGHT CLICK.....	23
MAIN MENU – SELECTING ROUTES	24
MAIN MENU – SELECTING ROUTES + FILTER.....	25
MAIN MENU – FAST ACCOUNT INFO	26
MAIN MENU – FAST ACCOUNT INFO – SETUP	27
MAIN MENU – SETUP – COLORS & FAST KEYS.....	29
<i>VIDEO – Main Color Setup.....</i>	<i>29</i>
<i>VIDEO – Change Main Menu Style.....</i>	<i>29</i>
<i>VIDEO – Custom Dashboard</i>	<i>29</i>
MAIN MENU – GOOGLE MAPS.....	30
COMPANY / LINE OF BUSINESS.....	31
CREATE COMPANY / LINE OF BUSINESS	31
CREATE COMPANY – NAME AND ADDRESS	32
ACCOUNT.....	33
<i>VIDEO - Account Create</i>	<i>33</i>
<i>VIDEO – Account Create – Pest Control</i>	<i>33</i>
ACCOUNT CREATE – INITIAL ENTRY	33
ACCOUNT – MODIFY, INACTIVE, ACCOUNT STATUS.....	35
ACCOUNT – STANDARD CHARGES	35
<i>VIDEO – Standard Charges</i>	<i>36</i>
ACCOUNT – UPDATES	37
ACCOUNT – SALES TAX / TAX CODES	38
ACCOUNT REVIEW – SCREEN STYLE.....	39
<i>VIDEO – Account Review 01.....</i>	<i>39</i>
<i>VIDEO – Account Review – Pest Control.....</i>	<i>39</i>
<i>Style #101– General Info.....</i>	<i>39</i>
<i>Style #102 – General Info</i>	<i>40</i>
<i>Style #103 – General Info</i>	<i>42</i>
<i>Style #104 – General Info</i>	<i>43</i>
<i>Style #105 – General Info</i>	<i>44</i>
<i>Style #301 - Fertilization</i>	<i>45</i>
<i>Style #401 – Pest Control</i>	<i>46</i>
<i>Style #501 – Pest Control</i>	<i>47</i>
<i>Style #601 – Irrigation.....</i>	<i>48</i>
<i>Style #611 – Irrigation.....</i>	<i>48</i>
<i>Style #701 – Pool and Spa.....</i>	<i>50</i>

Style #801 – Cemetery	51
Style #901 – Plumbing	52
Style #915 – Loan Management	53
Style #916 – Publishing	54
Style #917 – Septic / Portal Toilets	55
Style #918 – Irrigation	56
Style #1001 – Heating and Air Conditioning	57
STANDARD CHARGES – ADDING / UPDATING	58
ACCOUNT INFORMATION - ADDING IMAGES AND PICTURES	60
TRANSACTIONS	62
TRANSACTION FILE – CHARGING YOUR CUSTOMER	62
<i>VIDEO – Transactions / Invoices</i>	62
<i>VIDEO – Fast Invoice</i>	62
<i>VIDEO – Invoice Registry</i>	62
<i>VIDEO – Find Invoice</i>	62
HOW TO ENTER A CHARGE	63
HOW TO ENTER A PAYMENT:	63
TRANSACTION FILE – DELETE ROW(S)	64
<i>VIDEO – Delete Transactions</i>	64
TRANSACTION FILE – YEARLY ACTIVITY DISPLAY AND GRID SIZE	65
JOB DESCRIPTIONS – MODIFY	66
JOB DESCRIPTIONS – COLUMN DEFINITIONS	67
CHARGES	68
MAKE CHARGES – SINGLE CHARGE PER ACCOUNT	68
MAKE CHARGES – SINGLE CHARGE PER ACCOUNT	69
MAKE CHARGES – MULTIPLE CHARGES PER ACCOUNT	70
<i>VIDEO – Applying Charges to Accounts</i>	70
ENTER PAYMENTS / CHECKS	77
<i>VIDEO – Enter Single Payment</i>	77
BATCH PAYMENTS	78
<i>VIDEO – Enter Batch Payments</i>	78
PRODUCE BILLS	80
<i>VIDEO - Produce Bills / Invoices</i>	80
<i>VIDEO – Adjusting the print for a Invoice</i>	80
PRODUCE BILLS – PRINT OPTIONS	81
PRODUCE BILLS – PRINT BY INVOICE NO	82
<i>VIDEO – Printing a Invoice</i>	82
BILL / INVOICE SAMPLES	83
STYLE #4 - BILL / INVOICE DEFAULT STYLE	86
ROUTES	94
ROUTES – CREATE	94
<i>VIDEO – Create a Route</i>	94
ROUTES – ADD ACCOUNTS, CHANGE ORDER AND ENTER NOTES.	95
<i>VIDEO – Change Route Order</i>	95
<i>VIDEO – Add to Route based on distance</i>	95
ROUTES – PRINT ROUTES	96
<i>VIDEO – Print Routes</i>	96
SAMPLE ROUTE SHEETS	96
RECURRING SCHEDULE	112
<i>VIDEO – Calendar Scheduling</i>	112
<i>VIDEO – Pest Control Scheduling / Billing</i>	112
<i>VIDEO – Schedule Quarterly Service</i>	112
<i>VIDEO – Schedule Monthly & Every 2 Weeks</i>	112
Select an account's Standard Charges	112
Standard Charges and Scheduling	113
Create Appointments (Update Schedule in Calendar)	114

<i>Create Appointments – results</i>	115
<i>Printing Route Sheets / Service Tickets</i>	116
<i>Print Service Tickets</i>	117
<i>Production Reports</i>	118
<i>Renewals</i>	120
<i>Renewal – Account Based</i>	121
REPORTS	122
REPORTS – BALANCE SUMMARY	122
VIDEO – REPORT DESIGNER	122
<i>VIDEO – Reports - Balance Summary</i>	122
<i>VIDEO – Reports – Aging Report</i>	122
REPORTS – BALANCE SUMMARY – REPORT STYLE SELECTION	122
REPORTS – PAYMENTS / DEPOSIT LISTING	124
<i>VIDEO – Reports – Payment Listing</i>	124
REPORTS – WORK COMPLETED	125
<i>VIDEO – Reports – Work Completed Report</i>	125
<i>VIDEO – Reports – Print Transaction File Report</i>	125
REPORT – COMPANY TOTALS	126
<i>VIDEO – Reports – Company Totals</i>	126
REPORTS – NAME AND ADDRESS	127
<i>VIDEO – Reports – Name and Address</i>	127
CALENDAR	127
<i>VIDEO – Calendar Scheduling</i>	128
CALENDAR – MAKING AN APPOINTMENT	129
CALENDAR – ENTERING APPOINTMENT INFO	130
CALENDAR / SCHEDULE – VIEW AS GRID	131
SYSTEM CONFIGURATION	132
SALES TAX SETUP	133
ZIP CODES	134
CONFIGURATION	135
GENERAL SETUP	135
SECURITY	137
PROPOSALS / ESTIMATES	138
CREATE ESTIMATE FOR ACCOUNT	138
<i>VIDEO – Create General Estimate / Proposal</i>	138
<i>VIDEO – Contracts and Renewal Letters</i>	138
EXPENSES	143
CREATE EXPENSE FILE	144
ENTERING EXPENSES	145
SUPPORT – HELP	146
BACKUP	147
CHARTS	148
CREATING ESTIMATES, TRACKING ESTIMATES	151
ESTIMATE CONFIGURATION	152
ESTIMATE - PRINT	154
FORM LETTERS	157
COLLECTION LETTERS	157
SAMPLE COLLECTION LETTER	162
FIELD INSERTION LIST	164
FIELD INSERTION – CREATING CUSTOM FIELDS	165

EMAIL 167

BAR CODE SCANNER SETUP 175

INDEX..... 180

INSTALLATION

BILLMASTER II is installed by your support representative. Updates are available on our website at www.billmaster.info.

To update your version of BILLMASTER:

1. Backup your database.
2. Go to www.billmaster.info
3. Select the Downloads page
4. Double click on the version link, and select RUN.
5. The update will download and run, and continue to press NEXT and the update will install.

The screenshot shows the BILLMASTER II website. At the top, there is a logo for BILLMASTER SOFTWARE, a BBB ACCREDITED BUSINESS badge, and a search bar. Below the logo, there is a navigation bar with links: Home, Features / Samples, Hardware Recommendation, BILLMASTER - On The Go, Testimonials & Referrals, **Download**, Pricing, and Contact Us. A red arrow points to the 'Download' link. Below the navigation bar, there is a large banner with the text 'Simple, Reliable, Scalable, Affordable' and 'Designed to m'. A yellow box in the center of the banner says 'Press Download to the current version of BILLMASTER'. Below the banner, there is a section titled 'BILLMASTER runs SECURELY on YOUR Office PC NOT in the cloud'. To the right of the banner, there are three smaller images: 'Simple, Reliable, Scalable, Affordable', 'BILLMASTER runs SECURELY on YOUR Office PC NOT in the cloud', and 'BILLMASTER Software Free conversion from your existing System'. At the bottom right, there is a section titled 'Features of BillMaster' with a list of features.

Call today to get started **201-620-8566**
email sales@billmaster.info

Search

Make Payment Download Pricing Contact Us

Home Features / Samples Hardware Recommendation BILLMASTER - On The Go Testimonials & Referrals **Download** Pricing Contact Us

Simple, Reliable, Scalable, Affordable
Designed to m

Press Download to the current version of BILLMASTER

BILLMASTER runs **SECURELY**
on **YOUR** Office PC **NOT** in the cloud

Simple, Reliable, Scalable, Affordable
Designed to meet the specific needs of your business

BILLMASTER runs **SECURELY**
on **YOUR** Office PC **NOT** in the cloud

BILLMASTER Software
Free conversion from your existing System

Features of BillMaster

- 5 new bills
- Quick time processing
- Billing - General Subcontracting
- Detailed Reports for any bill (all your business)
- Complete Reports - Finance - Customer
- Bill Summary
- Last version data
- Real-time data processing
- Detailed data
- Multiple Companies/Projects
- Detailed Information
- Simple Interface
- Complete Data Management Software

BILLMASTER II BY CUSTOMIZED BUSINESS SOFTWARE, LLC. BILLMASTER COPYRIGHT 1986-2015 ALL RIGHTS RESERVED. THIS SOFTWARE AND MANUAL ARE PROTECTED BY UNITED STATES COPYRIGHT LAW. UNAUTHORIZED COPYING, DUPLICATING, SELLING, OR OTHERWISE DISTRIBUTING, OF THIS MANUAL AND/OR SOFTWARE IS STRICTLY PROHIBITED AND IS A VIOLATION OF THE LAW. BILLMASTER IS A REGISTERED TRADEMARK OF CUSTOMIZED BUSINESS SOFTWARE.

Overview of BILLMASTER

BILLMASTER is a simple and easy to use system that provides solutions to meet your business needs.

BILLMASTER features:

- Statement Billing / Invoicing
- Routing, Scheduling
- Keeps a history of charges and payments
- Financial Reports (including Sales Tax)
- Contract, Estimates, Proposals
- Mailing Labels, Form Letters, Post Cards
- Search for any customer information quickly and easily
- Expenses / Check Writing
- Chemical Tracking based on EPA requirements
- Collection / Pre Pay Letters

BILLMASTER is well suited for the following types of businesses and those that do repeated services:

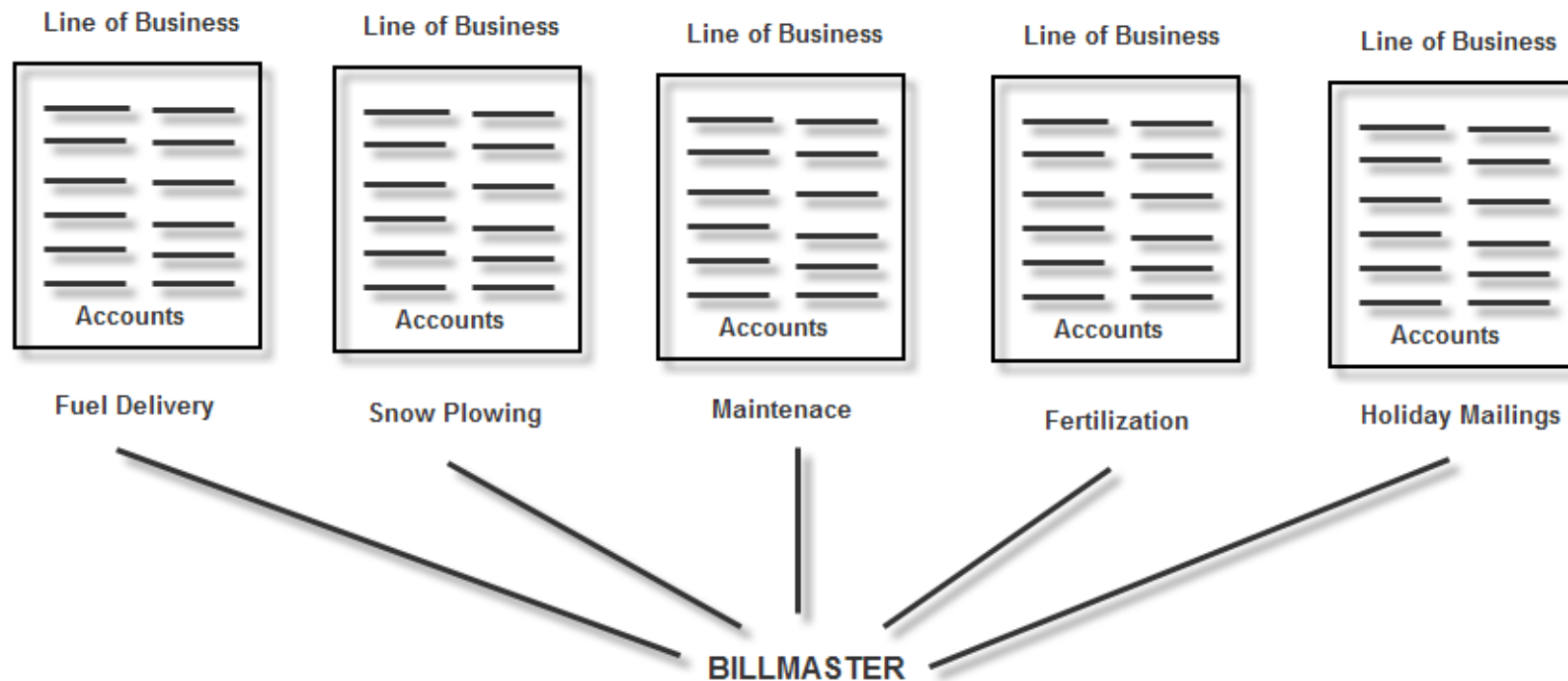
Lawn Maintenance and Landscaping	Irrigation, Tree Service & Snow Removal
Fertilization and Chemical Application	General Contracting and Construction
Pest Control & Extermination	Maid and Cleaning Services
Billing Services and Accounting	Sanitation and Trucking
Plumbing & Heating , Electricians	Pool and Spa Maintenance
General Contractors	Property Maintenance

BILLMASTER system requirements: Windows XP, Vista or Windows 7, 8.1. The system allows you to create multiple companies (Line of Business) with unlimited accounts in each company. You will be able to create your own list of Job Descriptions Codes so that the Transactions (work done) can be recorded quickly using your terminology. Finding account balances, reports and listings are simple.

Basic Concepts of BILLMASTER

BILLMASTER is created so that you may divide your accounts into Separate Companies or Lines of Businesses
OR

You may keep all your accounts in one company. It is up to you how to organize your accounts for your own purposes. It is as if you had a filing cabinet and each drawer is a separate Line of Business. In order to do any work you must first open the drawer (Select a Company / Line of Business). Then you can go into the Account Information, Transactions Files (contains history of charges, payments & current balance), Produce Bills, etc.



You can create unlimited companies. Each company can have unlimited number of accounts. Organize your accounts and business to suit your needs.

Getting started

In BILLMASTER II you can organize your business into Companies / Lines of Business, each having an unlimited number of accounts and full reporting functionality. BILLMASTER provides specific functions and features based on the company type that is selected.

When updating to BILLMASTER from DOS or Windows or another system, your data will be imported for you.

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | Descriptions | Estimates | Email / More / Other | **Reports** | Routes | Trans / Pymts | Util / Help

F2 - Review / Modify
 Create New Account
 Transactions
 Standard Charges
 Notes
 Delete Account
 Copy (Duplicate) Account
 Copy Accounts to Another Company
 Merge Transactions to Company
 Standard Charge Updates
 Update Periodic Schedule
 Click below to scan

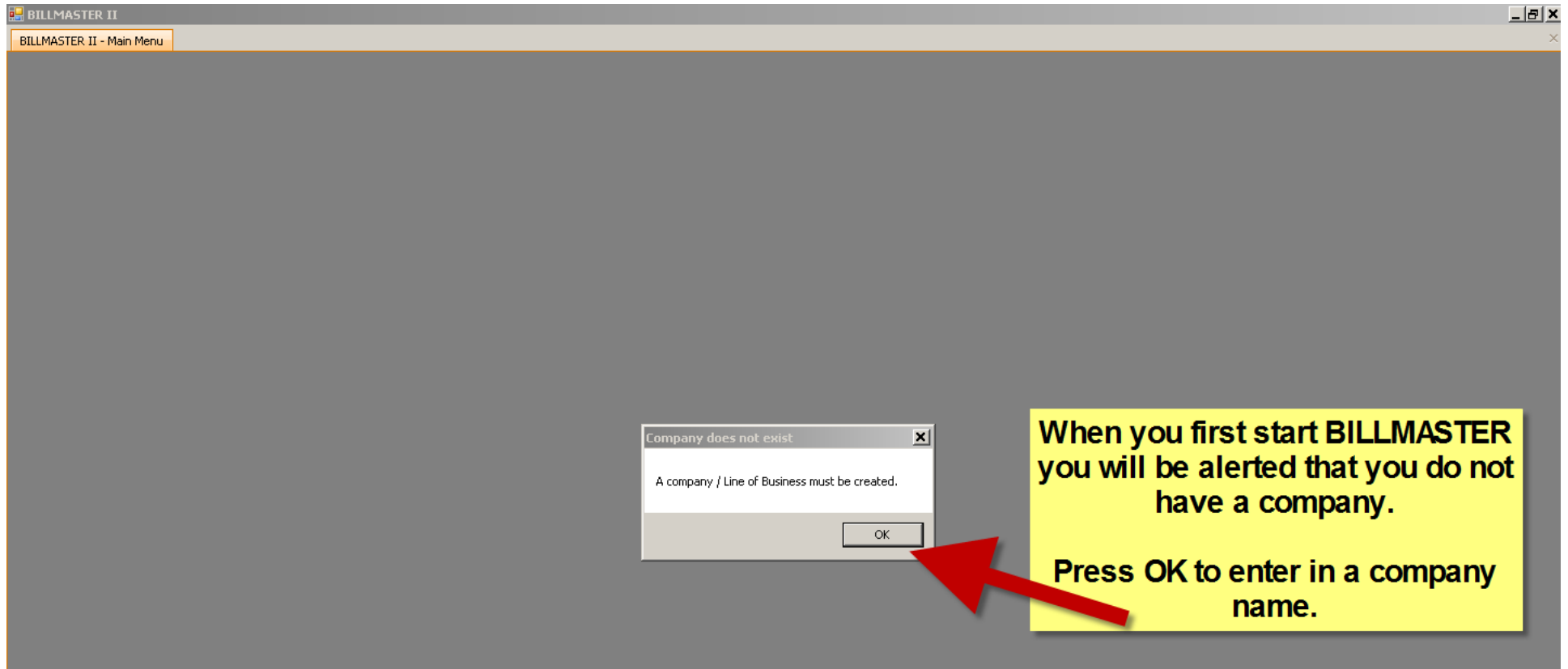
Quick Pick: [] Route: [] Inactive [x] Excel [x] Dash [] Calc [] SndTst [] Refresh Bal [] Clear 1 [] Select All [] Clear 2 [] Range [] Review [] PRT Rte Cal [] Del Rng [] Excel 2 []

Menu Name	Group 1	Balance	Phone 1	Street	City
1	COM	0.00	111-222-3333	501 Darby Creek Suite 58	Lexington,
2	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
3	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
4		0.00	111-222-3333	108 Demand Ct.	Georgetown
5	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
6		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
7		0.00	111-222-3333	800 Delany Woods	Nicholasville
8		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
9					
10					Georgetown
11					Georgetown
12					Lexington
13					Georgetown
14					Georgetown
15					Catlettsburg
16					Georgetown
17	CUST	0.00	111-222-3333	822 Palsade Ave.	Teaneck
18		0.00	111-222-3333	202 Paynes Landing	Georgetown
19		0.00	111-222-3333	481 General John Payne	Georgetown
20		0.00	111-222-3333	102 Summerridge Way	Georgetown
21		0.00	111-222-3333	128 Edwards Dr.	Georgetown
22		0.00	111-222-3333	198 Victoria Way	Georgetown
23		0.00	111-222-3333	128 Edwards Dr.	Georgetown
24		0.00	111-222-3333	128 Edwards Ave	Georgetown
25		0.00	111-222-3333	850 Steele Ford Rd.	Paris
26		0.00	111-222-3333	2125 Call Dr.	Lexington,
27	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
28	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
29	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown

Record 1 of 1534 | 29230.84 | Record 0 of 0

Creating a Company

When first starting BILLMASTER, you will be alerted that you do not have a company, as shown below. Press OK to enter a company name.



Step 1 – Enter Company Name

The screenshot shows the BILLMASTER II software interface. A dialog box titled "Create Company / Line of Business" is open. It contains a "Name" field with the text "ABC Company" and a "Business Type" dropdown menu. The dropdown menu is open, showing a list of business types. A red arrow points from a yellow instruction box to the dropdown menu.

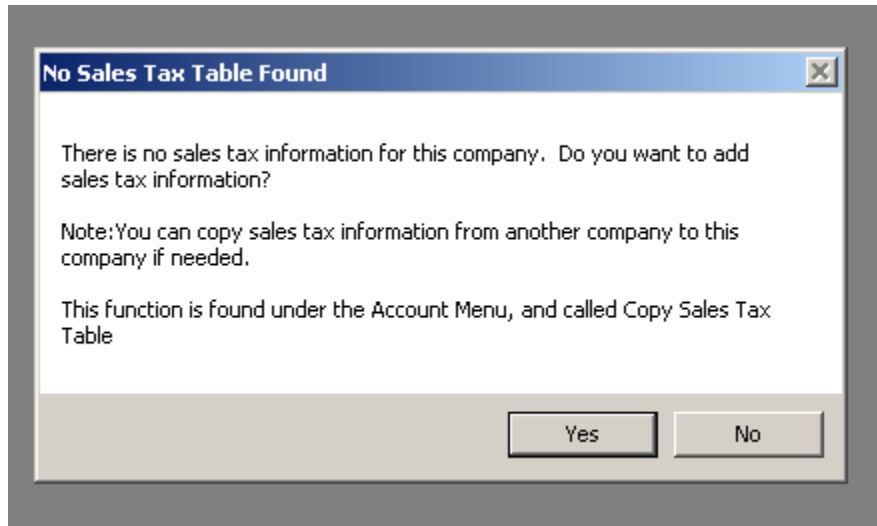
Enter in your company name and select Business Type and press OK

Business Type List:

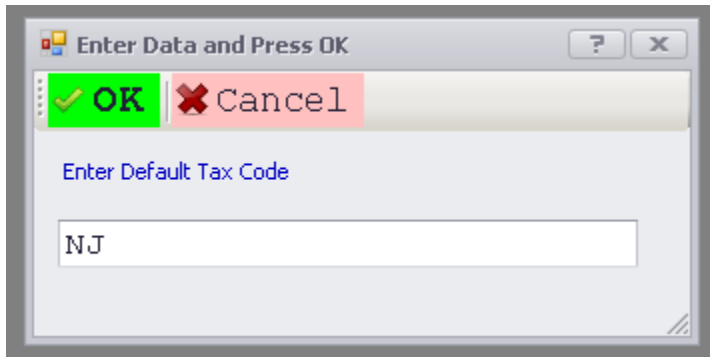
- 0 - General
- 1 - Landscaping / Lawn Maintenance
- 2 - Irrigation
- 3 - Fertilization
- 4 - Pest Control
- 5 - Commerical Cleaning
- 6 - Excavating
- 7 - Waste Management and Trucking
- 8 - Nursery
- 9 - Construction / General Contracting
- 10 - Oil Delivery
- 11 - Plumbing and Heating
- 12 - HVAC
- 13 - Marketing
- 14 - Cemetery Management
- 15 - Pool & Spa
- 16 - Electrician
- 17 - CO2 Maint

Sales Tax Setup / Configuration

After creating your company, you will be prompted if you need to Setup your Sales Tax percentages.



Enter the default Sales Tax Code and press OK. Then enter the Sale Tax percentage and press OK.

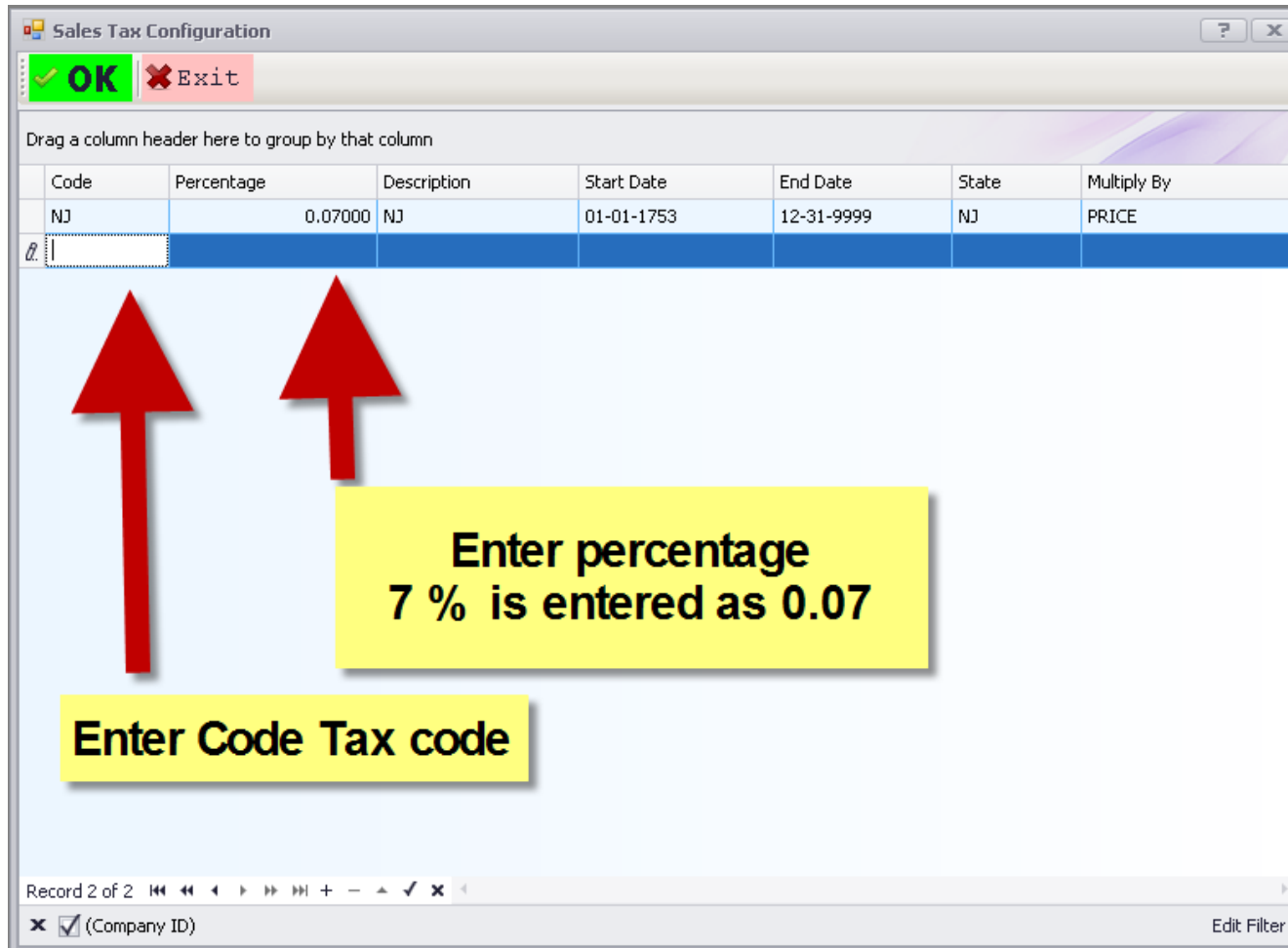


Enter Data and Press OK

OK Cancel

Enter Default Tax Code

NJ



Sales Tax Configuration

OK Exit

Drag a column header here to group by that column

Code	Percentage	Description	Start Date	End Date	State	Multiply By
NJ	0.07000	NJ	01-01-1753	12-31-9999	NJ	PRICE
?						

Enter Code Tax code

Enter percentage
7 % is entered as 0.07

Record 2 of 2

(Company ID) Edit Filter

Job Descriptions

Job Descriptions is a list of service descriptions and or items that you provide for your customers. Each account can have a different price for any Job Description. Example: Monthly Service \$200.00; Quarterly Service \$250.00

The Job Description File(s) is a database for common job descriptions and items. Using a code is a quick way of typing. When you enter a code, the description and pricing automatically appears.

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | **Descriptions** | Estir | Util / Help

Create / Modify Job Descriptions | Descriptions Menu | Packages / Programs

Print Job Description List

Job Descriptions

Quick Pick: [] | Route: []

Job Descriptions

Fast Keys | Other | Grid Configuration | Job Description Defaults

Save | Cancel | Select All Rows | DELETE Selected Row(s)

Default Job Description Company: ABC Company

Default Filter (General Setup to change)

Refresh View

Fill Category | Print Grid | Pricing for Code

Fill Tax Code 1 | Chemical Program | General Setup

Fill Multiplier | Excel | Press "I" to select items to insert into Transaction File

Assembly | Copy to Material List | Packages / Programs

Drag a column header here to group by that column

Double click row to insert into transaction file

Category	Code	Description	Short Desc	Price	Type	Tax Cd1	Frequency
	234	Termite Retreat	234	0.00	0		
	235	Termite Warranty Renewal	235	0.00	1		
	236	Truck Repair	236	0.00	0		
	237	Try to Sale Pest Control	237	0.00	0		
	238	Pre-treat Estimate	238	0.00	0		
	245	Wasps	245	125.00	1		
	246	Wasp - First Follow up	246	62.50	0		
	246	Work in chemical storage	246	0.00	0		
	247	Work in Office	247	0.00	0		
	248	Wash and Clean inside of truck	248	0.00	0		
	340	Termite Treatment	340	0.00	1		
	341	Termite Treat - Finish Job	341	0.00	0		
	500	Misc.	500	0.00	1		
I	9	Enter New Codes at the bottom		0.00	0	KY	

4032.50

Record 98 of 98

(Company ID)

Standard Job Description File:

BILLMASTER creates the first Job Descriptions file for you. This file contains common Job Description codes for Payments, Credits, Service Charges, Standard Work Descriptions, etc. You may add and change codes and descriptions in this file.

Job Descriptions

Fast Keys | Other | Grid Configuration | Job Description Defaults

Standard | Lawn Maintenance | Fertilization | Pest Control #1 | PC (SPSC) #2 | Pest Control #3

Pool and Spa | Pest Control #4 | Skeeter Shield | Loan Management | Publishing | PC (SPSC) #5

PC and Lawn | PC (SPSC) #6

Drag a column header here to group by that column **Double click row to insert into transaction file**

Category	Code	Description	Short Desc	Price	Type
	8	New Description entered on the last row		0.00	0
	1	Pest Inspection, NC	1	0.00	0
	3	Payment - Thank You	3	0.00	3
	7	Monthly Service	7	0.00	0
	100	Animal Trapping	100	135.00	1
	101	Animal Trapping - Additional Animal	101	45.00	0
	102	Animal Trapping - Ck. Trap Re bait	102	0.00	0
	103	Animal Trapping - Check Trap and remove.	103	0.00	0
	104	Bird Trapping and exclusion	104	0.00	0
	105	Ants First Treat	105	90.00	1
	106	Ants First Follow up	106	45.00	0
	107	Ants - Third Treat	107	0.00	0
	108	Auto Repair	108	0.00	0
	109	Bird mites	109	0.00	0
	110	Bed Bugs - First Treat	110	0.00	1

4032.50

Record 1 of 97

☒ (Company ID)

Initially you can load in default job descriptions, by press any of the buttons shown above.

You can then delete as needed for the codes that are not relevant.

Create New Account

To create a new account either press the "Create New" button or Create New Account from the Account Menu.

1 To Create a new account press "Create New Account"

2 Enter the Menu Name for the account below and press OK
Example: SMITH, JOHN

3 If you wish to create the account menu name using the first and last name, set this option under the account default settings

4 Press OK to save

Account Default Settings

Use Company Type - Create New Account Screen ☐

A - Default City, State, and Zip Code Next Customer Number 2643

B - Phone Labels HOME OFFICE FAX OTHER CELL

C - Site Area Labels

1. 6.
2. 7.
3. 8.
4. 9.
5. 10.

Account Screen Box Settings

Contacts, E-Mail, Credit Cards ☐ Bill To ☒
Routes ☒ Job Location ☒
Site Info ☐ Standard Charges ☒
Phone Numbers ☒ Account Notes List ☐
Show Cust No Field ☐ Show First, Last Name ☒
Show Payment Status ☐ Warn Missing Address ☐

I - Send Paper Bill ☐ M - Calculate Standard Charge when Creating Account ☐
J - Send E Mail ☐ O - Ask to remove Tax Code for non taxed accounts ☐
K - Charge CC Monthly ☐ P - Hide Route note defaults ☐
L - Option 1 ☐ Q - Default Bid Type
N - Verify Default Tax Code ☐

F - Charge Sales Tax ☐
G - Repeat Menu name for Company name ☐
H - Repeat Menu name for Personal name ☒
M - Account Type Default

Pages / Programs

Pages / Programs - Standard Charge Default Codes - Package 1

Menu Name	Group 1	Balance
15	Amanda Shapaka	
16	Amanda Thorpe	
17	Amazing Pest Control	CUST 0.0
18	Amber Ott	0.0
19	Amy Baron	0.0
20	Amy Barron	0.0
21	Amy Barron (Remax Creative)	0.0
22	Amy Barron 001	
23	Amy Barron 002	
24	Amy Barron 003	
25	Amy Canham	
26	Amy Clark	
27	Amy Conham	CUST 0.0
28	Amy Crist	RES 0.0
29	Amy Curtis	RES 0.0

Record 1 of 1534

Record 0 of 0

New Account Information

[VIDEO - Create Account](#)

Enter the name, address and phone number information for the account

1. Account Type – You can create as many groups as you want to further organize and sub divide your account group.
2. The account status is the payment status for your account. Yellow is later payer. Red is delinquent payer. This is your choice.
3. Set the price for services you provide for this account's Standard Charges.
4. Press Save and Add another if you want to continue to create a new account.

The screenshot shows the 'Create Account' window with the following sections and fields:

- General Info:**
 - Account Menu Name:
 - Customer Letter: Customer Code (Up to 4 characters):
 - Customer Status: Account Type:
 - e-mail: ☐ Verified
- Bill To:**
 - Company:
 - Personal:
 - Street: House #:
 - City, St, Zip:
- ☒ Job Location same as Bill To address (Copy for initial entry only)
- Job Location:**
 - Company:
 - Personal:
 - Street: House #:
 - City, St, Zip:
- Phone Numbers:**
 - HOME:
 - OFFICE:
 - FAX:
 - OTHER:
 - CELL:
- Taxes / Services:**
 - ☐ Apply Service Charge if needed
 - ☒ Charge Taxes?
 - ☒ Send Paper Bill
 - ☐ Send e-Bill
 - ☐ Charge Credit Card Monthly
 - ☐ Option 1
 - ☐ Alert
 - ☐ Contact
 - ☐ Vendor
 - ☐ Estimate
 - ☐ Bulk
 - ☐ No Label/Mailer
 - Default Tax Code:

Red arrows point from yellow callout boxes to the following fields:

- Account Type (COM)
- Standard Charges (201-555-1234)
- Account Default Settings (top right)

Yellow callout boxes contain the following text:

- Account Types / Groups can be added and modified as you need.
- Set the price for services when creating your account.
- Set the Account Default settings to speed up the entry of new accounts.

VIDEO - Create Account – Pest Control

Enter Account Menu Name and Press SAVE

Save Exit Account Settings Calendar Settings

Enter the Menu Name for the account below and press SAVE Example: SMITH, JOHN

Account Name

First Name: Andy

Last Name: Able Group: RES

Menu Name: Able, Andy

Bill To:

Company:

Personal: Andy Able House #:

Street: 100 Oak Lane 100

CSZ: Martin KY 40324

☐ Job Location same as Bill To address

Job Location

☐ Clear Job Location address (Keep Company & Personal Name)

Company:

Personal: Andy Able House #:

Street: 100 Oak Lane 100

CSZ: Martin KY 40324

Service Type Price / Frequency

Find Code Description

7 Monthly Service

Price: 55 ☐ Charge Taxes

Frequency: Monthly

Default Tech: Glen

Target Pest: Roaches

Appointment

Select Service Type if entering a appointment

Start Date: 4/15/2015

AM / PM: AM

Start Hr: 11

Start Min: 0

Duration (Min): 30

Phone Numbers / E-Mail

HOME: 121-312-3121

OFFICE:

FAX:

OTHER:

CELL:

e-mail address:

Charging your customers

VIDEO – Transactions

Select Transactions for the customer to make a charge to their account. A Transaction File is the complete history of an account. It contains **ALL** charges and payments to the account. You must enter a charge here in order to produce a bill.

1. Balance for the account
2. Print a Bill for the account
3. The description can be as long as you want for your bills, even a paragraph.
4. Change the date for all rows selected
5. The Sub Total and Tax and Balance are shown for each row.

Job Loc: Resident 109 Copperfield Dr. Georgetown KY 40324

Fast Keys | Functions / Settings | Fill Columns, Add Data | Grid Configuration | Job Locations | Standard Charges

1 of 1
User: 1 - superuser SW

Allison Briggs
Balance: 133.75
Charge Taxes: YES NJ
Comments:

Fast Estimate:
HOME: 111-222-3333
OFFICE: 111-222-3333
FAX: 111-222-3333
OTHER CELL: 111-222-3333

Routes

Drag a column header here to group by that column

Transaction							Totals		Check No	Invoice No	Taxes Cha...	
Code	Description	Qty	Price	Date	Δ	Type	Sub Tot	Bal	Chk No	Inv No	Job Loc	Tax 1
165	Moles	1.0000	175.00	05/13/2014		1	187.25	187.25	0	19166	1	NJ
3	Payment Thank You	1.0000	-187.25	05/13/2014		3	-187.25	0.00	0	20459	1	NJ
165	Moles	1.0000	125.00	07/09/2014		1	133.75	133.75	0	20480	1	NJ
*												

Record 3 of 3

Active History

When you enter the code and press ENTER, the description for the code and the price you set up in the Standard Charges for this account will be entered.

OR

Type in any code, such as 500 and type any description you want with a date.

Job Loc: Resident 109 Copperfield Dr. Georgetown KY 40324

Fast Keys | Functions / Settings | Fill Columns, Add Data | Grid Configuration | Job Locations | Standard Charges

Save & Refresh | Cancel | Previous | 1 of 1 | Next | User: 1 - superuser SW

Print Bill | Prt Inv | Prt Open Inv | Std Ch | Job Descr | Chemical Rec | Account | Select All Rows | DELETE Selected Row(s)

Allison Briggs | Balance: 133.75 | Charge Taxes: YES NJ | Fast Estimate | HOME OFFICE FAX: 111-222-3333 | OTHER CELL: 111-222-3333

Routes

Print Active Trns | Print Archive Trns | Excel Active | Excel Archive

Drag a column header here to group by that column

Transaction								Totals		Check No	Invoice No	Taxes Cha...
Code	Description	Qty	Price	Date	Δ	Type	Sub Tot	Bal	Chk No	Inv No	Job Loc	Tax 1
165	Moles	1.0000	175.00	05/13/2014		1	187.25	187.25	0	19166	1	NJ 12.25
3	Payment - Thank You	1.0000	-187.25	05/13/2014		3	-187.25	0.00	0	20459	1	NJ 12.25
165	Moles	1.0000	125.00	07/09/2014		1	133.75	133.75	0	20480	1	NJ 8.75
I 500		1.0000	0.00	04/01/2015		1			0	0	1	NJ

1

Record 4 of 4

Active | History

Main Menu – Navigation

VIDEO – Main Menu Navigation

The Main Menu gives access to all your customer and system information. Defined buttons and controls let you to quickly navigate to any information or reporting that you need.

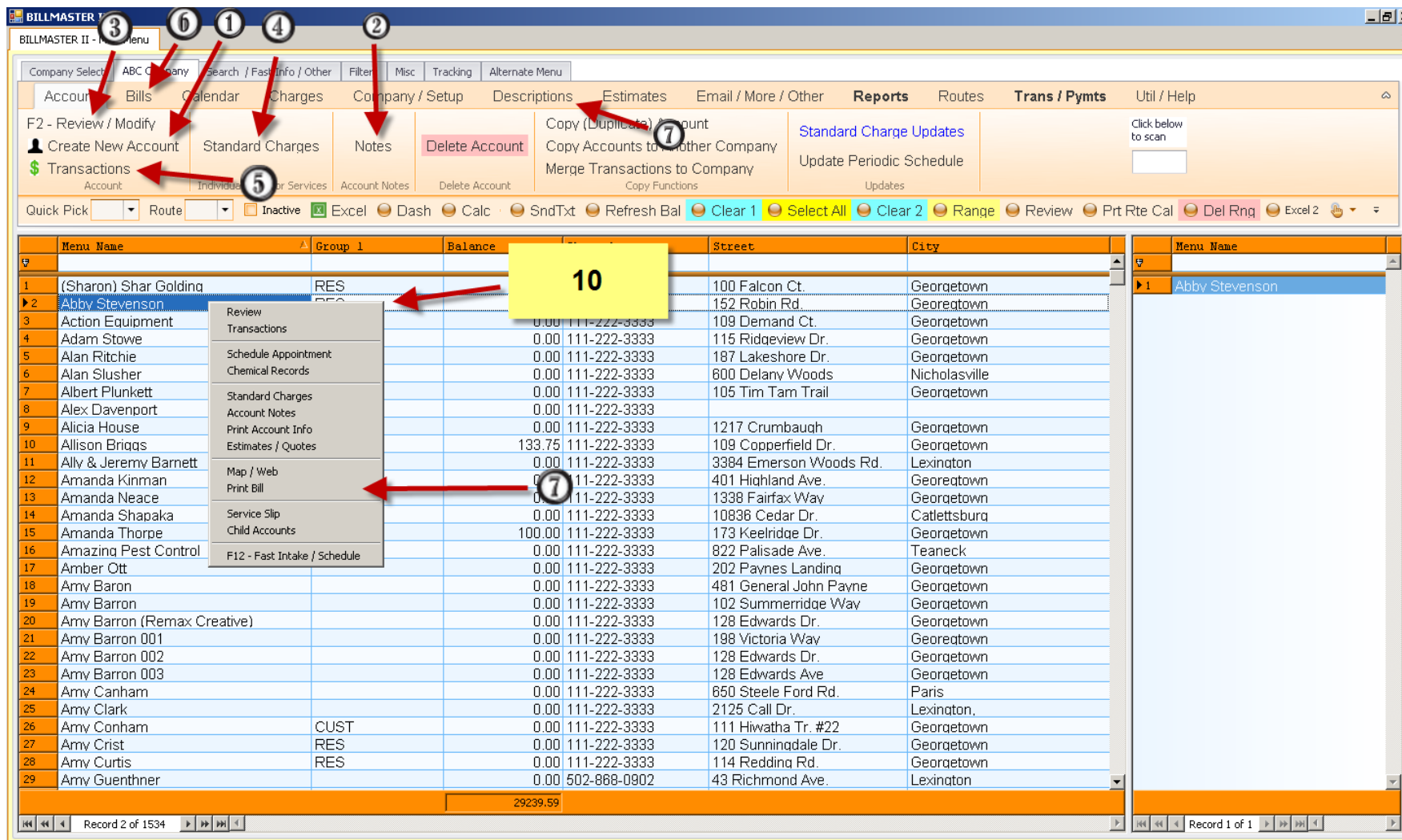
Company Information

1. You can select the Company you are working in using the top left Menu drop down.
2. The number of customers in the company is shown at the bottom of the grid.
3. Press the Help button to view this manual on your screen.
Press the About button to view BILLMASTER support and contact and version information.
4. Display of the current user logged onto the system. BILLMASTER can have multiple users.

The screenshot displays the BILLMASTER II Main Menu interface. The top menu bar includes options like Company Select, Account, Bills, Calendar, Charges, Company / Setup, Descriptions, Estimates, Email / More / Other, Reports, Routes, Trans / Pymts, and Util / Help. Below this is a toolbar with buttons for F2 - Review / Modify, Create New Account, Transactions, Standard Charges, Notes, Delete Account, Copy (Duplicate) Account, Copy Accounts to Another Company, Merge Transactions to Company, Copy Functions, Standard Charge Updates, and Update Periodic Schedule. A large grid displays customer information with columns for Menu Name, Group 1, Balance, Phone 1, Street, and City. The grid shows a list of customers, with 'Abby Stevenson' highlighted. A sidebar on the right shows a list of users, with 'Abby Stevenson' selected. Red arrows and numbered circles (1, 2, 3, 4) point to specific features: 1 points to the 'Company Select' dropdown, 2 points to the 'Transactions' button, 3 points to the 'Help' button, and 4 points to the 'Abby Stevenson' user in the sidebar. The bottom status bar shows 'Record 2 of 1534' and '29239.59'.

Account Information

1. Create Account – To create a new account press this button.
2. Account Notes – To access account notes. These are individual notes you may wish to keep on the account.
3. Account Review – When an account is selected from the Grid or OK is pressed, the customer account name and address screen will be shown.
4. Standard Charges – To view and modify the standard charges for the account selected. Standard Charges are the individual prices for services provided for that individual. An example Monthly Maintenance for a charge of \$150.00 the type of service is the same, but the price varies by customer.
5. Transactions – To view all charges and payments posted to the account press this button.
6. Print Bills – Press this to produce / print bills and invoices.
7. Calendar – Display your company calendar. You can easily schedule appointments and make recurring appointments.
8. Job Descriptions – View and modify your Job Descriptions. This is a list of the common charges for products and services you provide for your customers.
9. Print Info – This prints account information in a summary format. Provides handy information about customer when visting them for estimates.
10. RIGHT CLICK on a selected account in the grid to access common functions



Route Selection, additional functions

1. Route – Select the route from this drop down. All of the accounts on the route will be highlighted in green in Grid1. Also the accounts will appear in route order in Grid 2.
2. Route with Filter – Select the route from this drop down. Only the accounts on the route will be highlighted in green in Grid1.
3. Delete Transactions – Select this delete transaction for a particular code for any data range. This is handy if you mistakenly apply charges to a number of accounts
4. Enter Payments / Checks – Select this button to enter checks / payments for the selected accounts.

BILLMASTER II

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | Descriptions | Estimates | Email / More / Other | Reports | Routes | Trans / Pymts | Util / Help

F2 - Review / Modify | Create New Account | Standard Charges | Notes | Delete Account | (Duplicate) Account | Standard Charge Updates | Click below to scan

Account | Individual Price for Services | Account Notes | Delete Account | Merge Transactions to Company | Copy Functions | Update Periodic Schedule | Updates

Quick Pick | Route | Inactive | Excel | Dash | Calc | SndTxt | Refresh Bal | Clear 1 | Select All | Clear 2 | Range | Review | Prt Rte Cal | Del Rng | Excel 2

Menu Name	01 Mon	02 Tue	03 Wed	04 Thu	05 Fri	06 Sat	07 Sun	Group 1	Balance	Phone 1	Street	City
(Sharon) Shar Gold								RES		111-222-3333	100 Falcon Ct.	Georgetown
Abby Stevenson								RES		111-222-3333	152 Robin Rd.	Georgetown
Action Equipment									0.00	111-222-3333	109 Demand Ct.	Georgetown
Adam Stowe								RES		111-222-3333	115 Ridgeview Dr.	Georgetown
Alan Ritchie									0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
Alan Slusher									0.00	111-222-3333	600 Delany Woods	Nicholasville
Albert Plunkett									0.00	111-222-3333	105 Tim Tam Trail	Georgetown
Alex Davenport									0.00	111-222-3333		
Alicia House									0.00	111-222-3333	1217 Crumbaugh	Georgetown
Allison Briggs									133.75	111-222-3333	109 Copperfield Dr.	Georgetown
Ally & Jeremy Barnett									0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
Amanda Kinman									0.00	111-222-3333	401 Highland Ave.	Georgetown
Amanda Neace									0.00	111-222-3333	1338 Fairfax Way	Georgetown
Amanda Shapaka									0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
Amanda Thorpe									100.00	111-222-3333	173 Keelridge Dr.	Georgetown
Amazing Pest Control								CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
Amber Ott									0.00	111-222-3333	202 Paynes Landing	Georgetown
Amy Baron									0.00	111-222-3333	481 General John Payne	Georgetown
Amy Barron									0.00	111-222-3333	102 Summerridge Way	Georgetown
Amy Barron (Remax Creative)									0.00	111-222-3333	128 Edwards Dr.	Georgetown
Amy Barron 001									0.00	111-222-3333	198 Victoria Way	Georgetown
Amy Barron 002									0.00	111-222-3333	128 Edwards Dr.	Georgetown
Amy Barron 003									0.00	111-222-3333	128 Edwards Ave	Georgetown
Amy Canham									0.00	111-222-3333	650 Steele Ford Rd.	Paris
Amy Clark									0.00	111-222-3333	2125 Call Dr.	Lexington
Amy Conham								CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
Amy Crist								RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
Amy Curtis								RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
Amy Guenther									0.00	502-868-0902	43 Richmond Ave.	Lexington

Record 1 of 1534 | 29239.59 | Record 0 of 0

Parent Lists, additional functions

1. Chemical Records – From the Estimate / More menu, access the accounts chemical records. The chemicals records holds all the chemical, operator, technician and application temperature, wind, etc. information.
Print Envelope – Quick access to print an envelope for the accounts selected.
2. Parent Lists – Select the user list from this drop down. All of the accounts on the list will be highlighted in green in Grid1. User Lists are lists that you create that are not a route list. They can be for any purpose, such as a list of people you want to send a marketing letter to, or e-mail.
Add to List – This will add the selected accounts to a list.
3. Search Extra – This provides additional search filters for you to display accounts. You can search for inactive accounts, by Account Payment Status, or if the account has monthly credit card.

Menu Name	Group 1	Balance	Phone 1	Street	City
(Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
Alan Ritchie		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
Alex Davenport		0.00	111-222-3333		
Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
Amy Guenther		0.00	502-888-0902	43 Richmond Ave.	Lexington

Search, additional functions

1. Clear 1 – This will clear all selected accounts in Grid1
2. Select ALL – will select all accounts shown in Grid 1 and insert them onto Grid 2.
3. Clear 2 – This will clear all selected accounts in Grid2
4. Range – Enter a range of accounts to select. Example: Range 20 to 55.

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | Descriptions | Estimates | Email / More / Other | Reports | Routes | Trans / Pymts | Util / Help

F2 - Review / Modify | Create New Account | Standard Charges | Notes | Delete Account | Copy (Duplicate) Account | Standard Charge Updates | Click below to scan

Transactions | Account | Individual Price for Services | Account Notes | Delete Account | Copy Accounts to Another Company | Merge Transactions to Company | Update Periodic Schedule | Updates

Quick Pick | Route | Inactive | Excel | Dash | Calc | SndTxt | Refresh Bal | Clear 1 | Select All | Clear 2 | Range | Review | PRT Rte Cal | Del Rng | Excel 2

Menu Name	Group 1	Balance	Phone 1	Street	City
1 (Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2 Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3 Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4 Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview	Georgetown
5 Alan Ritchie		0.00	111-222-3333	600 Lakeshore	Georgetown
6 Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
7 Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8 Alex Davenport		0.00	111-222-3333		
9 Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10 Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11 Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12 Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13 Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14 Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15 Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16 Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17 Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18 Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19 Amy Barron		0.00	111-222-3333	102 Summeridge Way	Georgetown
20 Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21 Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22 Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23 Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
24 Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
25 Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26 Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27 Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28 Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29 Amy Guenther		0.00	502-868-0902	43 Richmond Ave.	Lexington

Record 1 of 1534 | 29239.59 | Record 0 of 0

Main Menu – Function Selection

First select accounts for your function. Press Select ALL for all accounts

You can select the main functions from the menu bar at the top of the screen.

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | **Charges** | Company / Setup | Descriptions | Estimates | Email / More / Other | **Reports** | Routes | Trans / Pymts | Util / Help

\$ Apply Charges to Accounts | Charge Options ▾ | Enter Payments / Checks | Fuel Surcharge | Review & Validate | Update Pending Charges | Batch - Enter Pay | Click below to scan

Charge By Route | Single Charge Per Account | Enter Parent Payment | Fuel History | Fast Input | List All Pending Charges | Batch Invoices (Ma |) | (leted)

Apply Charges in Batch | Apply Charges | Payments / Checks | Fuel | Review Validate | Pending Charges | Batch Payments

Quick Pick ▾ | Route ▾ | ☐ Inactive ☒ Excel ☐ Dash ☐ Calc ☐ SndTxl ☐ Refresh Bal ☐ Clear 1 ☒ Select All ☐ Clear 2 ☐ Range ☐ Review ☐ Prt Rte Cal ☐ Del Rng ☐ Excel 2

	Group 1	Balance	Phone 1	Street	City	Menu Name
1	(Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2	Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3	Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4	Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5	Alan Ritchie		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6	Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
7	Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8	Alex Davenport		0.00	111-222-3333		
9	Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10	Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11	Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12	Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13	Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14	Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15	Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16	Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17	Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18	Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19	Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
20	Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21	Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22	Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23	Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
24	Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
25	Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26	Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27	Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28	Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29	Amy Guenther		0.00	502-868-0902	43 Richmond Ave.	Lexington

Record 1 of 1534 | 29239.59 | Record 1 of 12

Main Menu – Selecting Accounts

You can select accounts by using several controls. Typically you can select by using the mouse and clicking on accounts and double click to do the function. You can also select multiple accounts by pressing the Ctrl (Control) key as you make multiple selections. You can also use the Search function to find accounts. After the account is selected it will be highlighted in blue.

BILLMASTER II - Main Menu

Company Select: ABC Company Search / Fast Info / Other Filters Misc Tracking Alternate Menu

Account Bills Calendar Charges Company / Setup Descriptions Estimates Email / More / Other Reports Routes Trans / Pymts Util / Help

\$ Apply Charges to Accounts Charge Options ▼ Enter Payments / Checks Fuel Surcharge Review & Validate Update Pending Charges Batch - Enter Pay (Click below to scan)

Charge By Route Single Charge Per Account Enter Parent Payment Fuel History Fast Input List All Pending Charges Batch Invoices (M...leted)

Apply Charges in Batch Apply Charges Payments / Checks Fuel Review Validate Pending Charges Batch Payments

Quick Pick Route Inactive Excel Dash Calc SndTxt Refresh Bal Clear 1 Select All Clear 2 Range Review Prt Rte Cal Del Rng Excel 2

	Menu Name	Group 1	Balance	Phone 1	Street	City
1	(Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2	Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3	Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4	Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5	Alan Ritchie		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6	Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
7	Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8	Alex Davenport		0.00	111-222-3333		
9	Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10	Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11	Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12	Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13	Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14	Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15	Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16	Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17	Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18	Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19	Amy Barron		0.00	111-222-3333	102 Summeridge Way	Georgetown
20	Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21	Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22	Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23	Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
24	Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
25	Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26	Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27	Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28	Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29	Amy Guenther		0.00	502-868-0902	43 Richmond Ave.	Lexington

Record 28 of 1534 29239.59

	Menu Name
1	Alan Slusher
2	Albert Plunkett
3	Alex Davenport
4	Alicia House
5	Allison Briggs
6	Ally & Jeremy Barnett
7	Amanda Kinman
8	Amanda Neace
9	Amanda Shapaka
10	Amanda Thorpe
11	Amazing Pest Control
12	Amber Ott
13	Amy Barron 003
14	Amy Curtis

Record 1 of 14

Main Menu – Selecting Account – Right Click

Access Common Account Functions by selecting an account and then Right Click. You will see the menu as shown below. Select your function as needed.

The screenshot displays the BILLMASTER II Main Menu interface. The top menu bar includes options like Company Select, Search, Filters, Misc, Tracking, and Alternate Menu. Below this, a secondary menu bar contains various functional areas: Account, Bills, Calendar, Charges, Company / Setup, Descriptions, Estimates, Email / More / Other, Reports, Routes, Trans / Pymts, and Util / Help. A toolbar below the menu bar offers actions such as F2 - Review / Modify, Create New Account, Transactions, Standard Charges, Notes, Delete Account, Copy (Duplicate) Account, Copy Accounts to Another Company, Merge Transactions to Company, Standard Charge Updates, and Update Periodic Schedule. A Quick Pick section includes buttons for Inactive, Excel, Dash, Calc, SndTxt, Refresh Bal, Clear 1, Select All, Clear 2, Range, Review, Prt Rte Cal, Del Rng, and Excel 2.

The main data table lists accounts with columns for Menu Name, Group 1, Balance, Phone 1, Street, and City. A right-click context menu is open for the account 'Abby Stevenson' (Menu Name: Abby Stevenson, Group 1: RES, Balance: 0.00, Phone 1: 111-222-3333, Street: 152 Robin Rd., City: Georgetown). The context menu options include: Review, Transactions, Schedule Appointment, Chemical Records, Standard Charges, Account Notes, Print Account Info, Estimates / Quotes, Map / Web, Print Bill, Service Slip, Child Accounts, and F12 - Fast Intake / Schedule. Red arrows point to the 'Review' and 'Transactions' options in the context menu. A circled '1' is placed near the 'Standard Charges' option.

Menu Name	Group 1	Balance	Phone 1	Street	City
1 (Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2 Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3 Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4 Adam Stowe		0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5 Alan Ritchie		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6 Alan Slusher		0.00	111-222-3333	00 Delany Woods	Nicholasville
7 Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8 Alex Davenport		0.00	111-222-3333		
9 Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10 Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11 Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12 Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13 Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14 Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15 Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16 Amazing Pest Control		0.00	111-222-3333	822 Palisade Ave.	Teaneck
17 Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18 Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19 Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
20 Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21 Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22 Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23 Amy Barron 003		0.00	111-222-3333	128 Edwards Ave.	Georgetown
24 Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
25 Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26 Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27 Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28 Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29 Amy Guenthrer		0.00	502-868-0902	43 Richmond Ave.	Lexington

The bottom status bar shows 'Record 2 of 1534' and a total balance of '29239.59'. The right sidebar shows 'Record 1 of 1'.

Main Menu – Selecting Routes

You can select Routes by choosing the Route List drop down. Note you must first create Routes. See Creating Routes.

The screenshot shows the BILLMASTER II Main Menu interface. The 'Routes' tab is selected. The 'Route' dropdown menu is open, showing a list of days: 01 Mon, 02 Tue, 03 Wed, 04 Thu, 05 Fri, 06 Sat, and 07 Sun. A red arrow points to the 'Route' dropdown menu. The main table displays a list of routes with columns: Menu Name, Group 1, Balance, Phone 1, Street, and City. The first route is (Sharon) Shar Gold, RES, 0.00, 111-222-3333, 100 Falcon Ct., Georgetown. The second route is Abby Stevenson, RES, 0.00, 111-222-3333, 152 Robin Rd., Georgetown. The third route is Action Equipment, RES, 0.00, 111-222-3333, 109 Demand Ct., Georgetown. The fourth route is Adam Stowe, RES, 0.00, 111-222-3333, 115 Ridgeview Dr., Georgetown. The fifth route is Alan Ritchie, 0.00, 111-222-3333, 187 Lakeshore Dr., Georgetown. The sixth route is Alan Slusher, 0.00, 111-222-3333, 600 Delany Woods, Nicholasville. The seventh route is Albert Plunkett, 0.00, 111-222-3333, 105 Tim Tam Trail, Georgetown. The eighth route is Alex Davenport, 0.00, 111-222-3333, 1217 Crumbaugh, Georgetown. The ninth route is Alicia House, 0.00, 111-222-3333, 109 Copperfield Dr., Georgetown. The tenth route is Allison Briggs, 133.75, 111-222-3333, 3384 Emerson Woods Rd., Lexington. The eleventh route is Ally & Jeremy Barnett, 0.00, 111-222-3333, 401 Highland Ave., Georgetown. The twelfth route is Amanda Kinman, 0.00, 111-222-3333, 1338 Fairfax Way, Georgetown. The thirteenth route is Amanda Neace, 0.00, 111-222-3333, 10836 Cedar Dr., Catlettsburg. The fourteenth route is Amanda Shapaka, 0.00, 111-222-3333, 173 Keelridge Dr., Georgetown. The fifteenth route is Amanda Thorpe, 100.00, 111-222-3333, 822 Palisade Ave., Teaneck. The sixteenth route is Amazing Pest Control, CUST, 0.00, 111-222-3333, 202 Paynes Landing, Georgetown. The seventeenth route is Amber Ott, 0.00, 111-222-3333, 481 General John Payne, Georgetown. The eighteenth route is Amy Baron, 0.00, 111-222-3333, 102 Summerridge Way, Georgetown. The nineteenth route is Amy Barron, 0.00, 111-222-3333, 128 Edwards Dr., Georgetown. The twentieth route is Amy Barron (Remax Creative), 0.00, 111-222-3333, 198 Victoria Way, Georgetown. The twenty-first route is Amy Barron 001, 0.00, 111-222-3333, 128 Edwards Dr., Georgetown. The twenty-second route is Amy Barron 002, 0.00, 111-222-3333, 128 Edwards Ave., Georgetown. The twenty-third route is Amy Barron 003, 0.00, 111-222-3333, 650 Steele Ford Rd., Paris. The twenty-fourth route is Amy Canham, 0.00, 111-222-3333, 2125 Call Dr., Lexington. The twenty-fifth route is Amy Clark, 0.00, 111-222-3333, 111 Hiwatha Tr. #22, Georgetown. The twenty-sixth route is Amy Conham, CUST, 0.00, 111-222-3333, 120 Sunningdale Dr., Georgetown. The twenty-seventh route is Amy Crist, RES, 0.00, 111-222-3333, 114 Redding Rd., Georgetown. The twenty-eighth route is Amy Curtis, RES, 0.00, 502-868-0902, 43 Richmond Ave., Lexington. The twenty-ninth route is Amy Guenther, 0.00, 502-868-0902, 43 Richmond Ave., Lexington. The status bar at the bottom shows 'Record 2 of 1534' and '29239.59'.

Menu Name	Group 1	Balance	Phone 1	Street	City
(Sharon) Shar Gold	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
Action Equipment	RES	0.00	111-222-3333	109 Demand Ct.	Georgetown
Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
Alan Ritchie		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
Alex Davenport		0.00	111-222-3333	1217 Crumbaugh	Georgetown
Alicia House		0.00	111-222-3333	109 Copperfield Dr.	Georgetown
Allison Briggs		133.75	111-222-3333	3384 Emerson Woods Rd.	Lexington
Ally & Jeremy Barnett		0.00	111-222-3333	401 Highland Ave.	Georgetown
Amanda Kinman		0.00	111-222-3333	1338 Fairfax Way	Georgetown
Amanda Neace		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
Amanda Shapaka		0.00	111-222-3333	173 Keelridge Dr.	Georgetown
Amanda Thorpe		100.00	111-222-3333	822 Palisade Ave.	Teaneck
Amazing Pest Control	CUST	0.00	111-222-3333	202 Paynes Landing	Georgetown
Amber Ott		0.00	111-222-3333	481 General John Payne	Georgetown
Amy Baron		0.00	111-222-3333	102 Summerridge Way	Georgetown
Amy Barron		0.00	111-222-3333	128 Edwards Dr.	Georgetown
Amy Barron (Remax Creative)		0.00	111-222-3333	198 Victoria Way	Georgetown
Amy Barron 001		0.00	111-222-3333	128 Edwards Dr.	Georgetown
Amy Barron 002		0.00	111-222-3333	128 Edwards Ave.	Georgetown
Amy Barron 003		0.00	111-222-3333	650 Steele Ford Rd.	Paris
Amy Canham		0.00	111-222-3333	2125 Call Dr.	Lexington
Amy Clark		0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
Amy Conham	CUST	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
Amy Crist	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
Amy Curtis	RES	0.00	502-868-0902	43 Richmond Ave.	Lexington
Amy Guenther		0.00	502-868-0902	43 Richmond Ave.	Lexington

Main Menu – Selecting Routes + Filter

You can also select a Routes + Filter and have only those accounts on the route display.

BILLMASTER II

BILLMASTER II - Main Menu

Company Select: ABC Company Search / Fast Info / Other Filters Misc Tracking Alternate Menu

Quick Pick: Search Customers / Scanner Input: **Search**

Select Route: Search Extra Find Invoice Clear 1 Clear 2 Select All

Route + Filter: 02 Tue Parent + Filter:

Menu Name: Amy Barron 003
Balance: 0.00
Phone Numbers:
 HOME : 111-222-3333
 OFFICE : 111-222-3333
 FAX : 111-222-3333

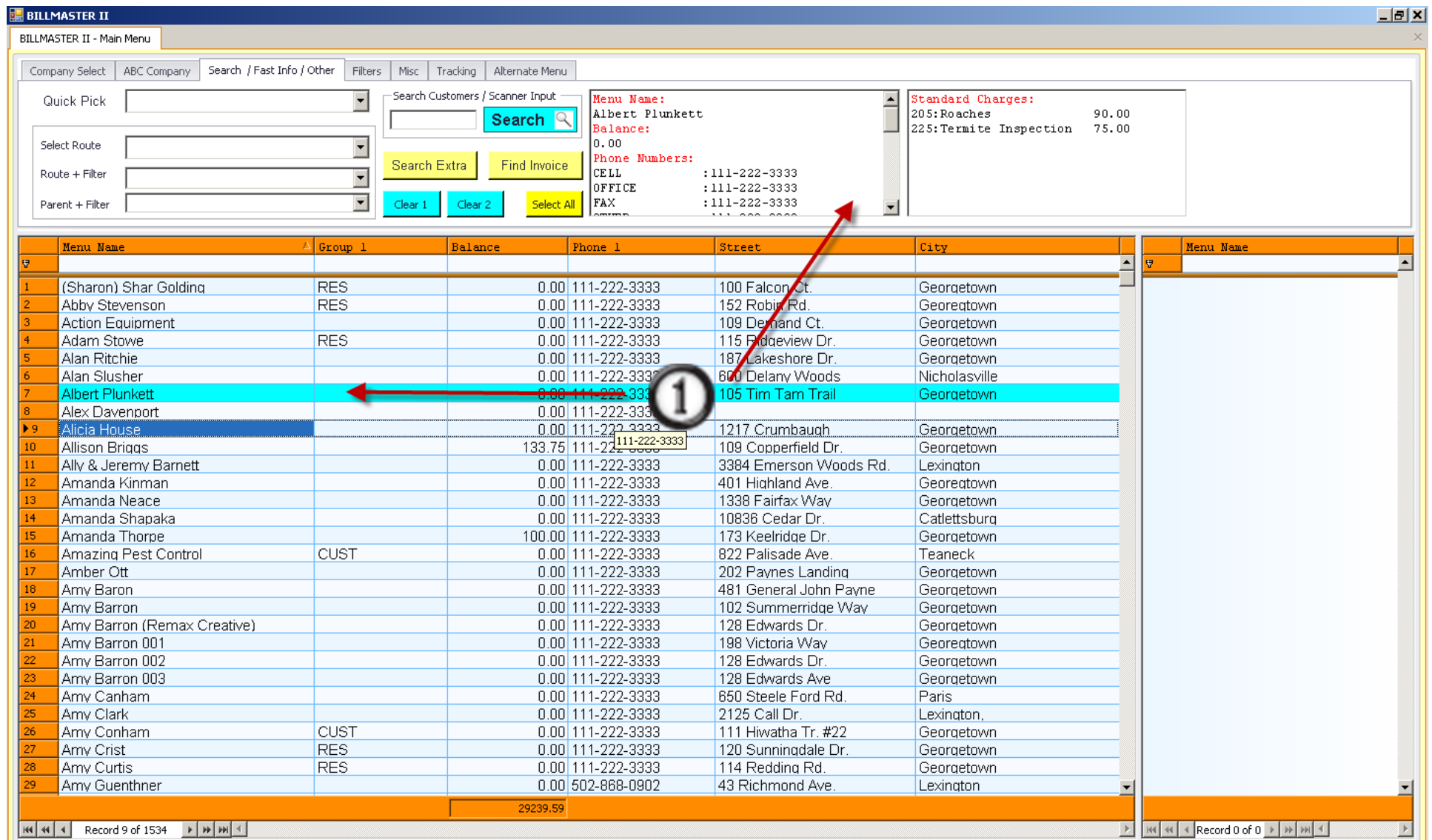
Standard Charges:
 225:Termite Inspection 75.00

	Menu Name	Group 1	Balance	Phone 1	Street	City
1	Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
2	Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
3	Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
4	Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown

Record 1 of 4 0.00 Record 0 of 0

Main Menu – Fast Account Info

1. You are able to configure account information to be seen without having to open up the account information screen. Press the **General Setup** button to access the configuration. General Setup is located under Company/Setup.



BILLMASTER II - Main Menu

Company Select: ABC Company Search / Fast Info / Other Filters Misc Tracking Alternate Menu

Quick Pick: Search Customers / Scanner Input: **Search**

Select Route: Search Extra Find Invoice

Route + Filter: Clear 1 Clear 2 Select All

Parent + Filter:

Menu Name: Albert Plunkett
Balance: 0.00
Phone Numbers:
 CELL : 111-222-3333
 OFFICE : 111-222-3333
 FAX : 111-222-3333

Standard Charges:
 205: Roaches 90.00
 225: Termite Inspection 75.00

	Menu Name	Group 1	Balance	Phone 1	Street	City
1	(Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2	Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3	Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4	Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5	Alan Ritchie		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6	Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
7	Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8	Alex Davenport		0.00	111-222-3333		
9	Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10	Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11	Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12	Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13	Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14	Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15	Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16	Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17	Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18	Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19	Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
20	Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21	Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22	Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23	Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
24	Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
25	Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26	Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27	Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28	Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29	Amy Guenther		0.00	502-868-0902	43 Richmond Ave.	Lexington

Record 9 of 1534 29239.59 Record 0 of 0

Main Menu – Fast Account Info – Setup

1. Access General Setup from the Company / Setup Menu Choice or the Setup Tab.

BILLMASTER II

BILLMASTER II - Main Menu

Company Select: ABC Company Search / Fast Info / Other Filters Misc Tracking Alternate Menu

Account Bills Calendar Charges **Company / Setup** Descriptions Estimates Email / More / Other Reports Routes Trans / Pymts Util / Help

Company ▼ **General Setup** Sales Tax Users System Setup / Ribbon Layout ▼ Acct Grp Def Click below to scan

Company Address Grid 1 Setup Copy Sales Tax Table Workers / Technicians Screen Style Selection ▼ BMOTG - Setup

Copy Company Address to Another Company Grid 2 Setup Zip Codes Sales Tax & Zip Codes Users / Technicians System & Screen Setup Groups

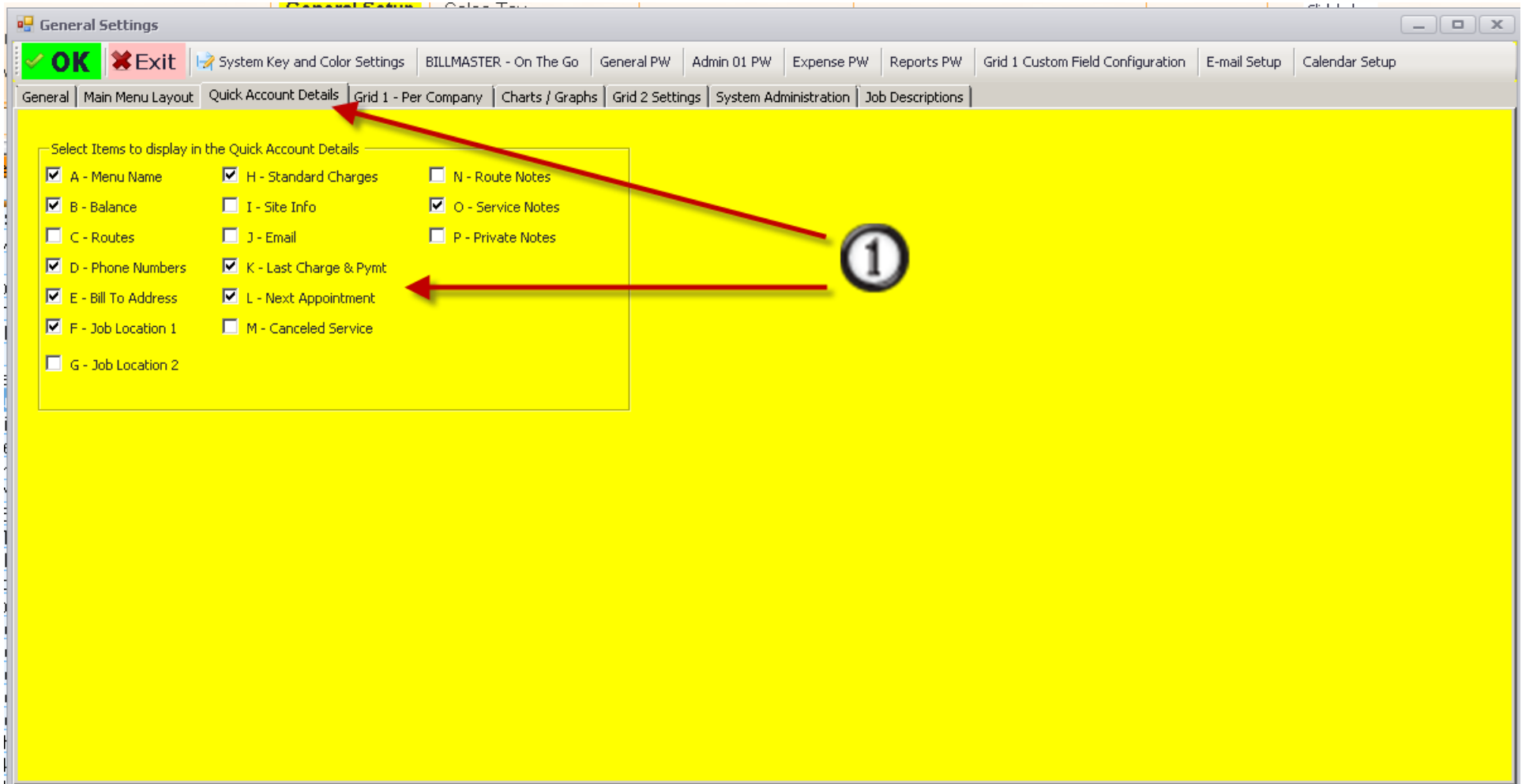
Quick Pick Route Inactive Excel Dash Calc SndTxt Refresh Bal Clear 1 Select All Clear 2 Range Review Pmt Rte Cal Del Rng Excel 2

Menu Name	Group 1	Balance	Phone 1	Street	City
1 (Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2 Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3 Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4 Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5 Alan Ritchie		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6 Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
7 Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8 Alex Davenport		0.00	111-222-3333		
9 Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10 Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11 Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12 Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13 Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14 Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15 Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16 Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17 Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18 Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19 Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
20 Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21 Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22 Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23 Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
24 Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
25 Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26 Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27 Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28 Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29 Amy Guenthner		0.00	502-868-0902	43 Richmond Ave.	Lexington

Record 9 of 1534 29239.59 Record 0 of 0

Main Menu – Fast Account Info – Setup Continued

1. Check the information you want displayed for the Fast Account information display on the main menu.



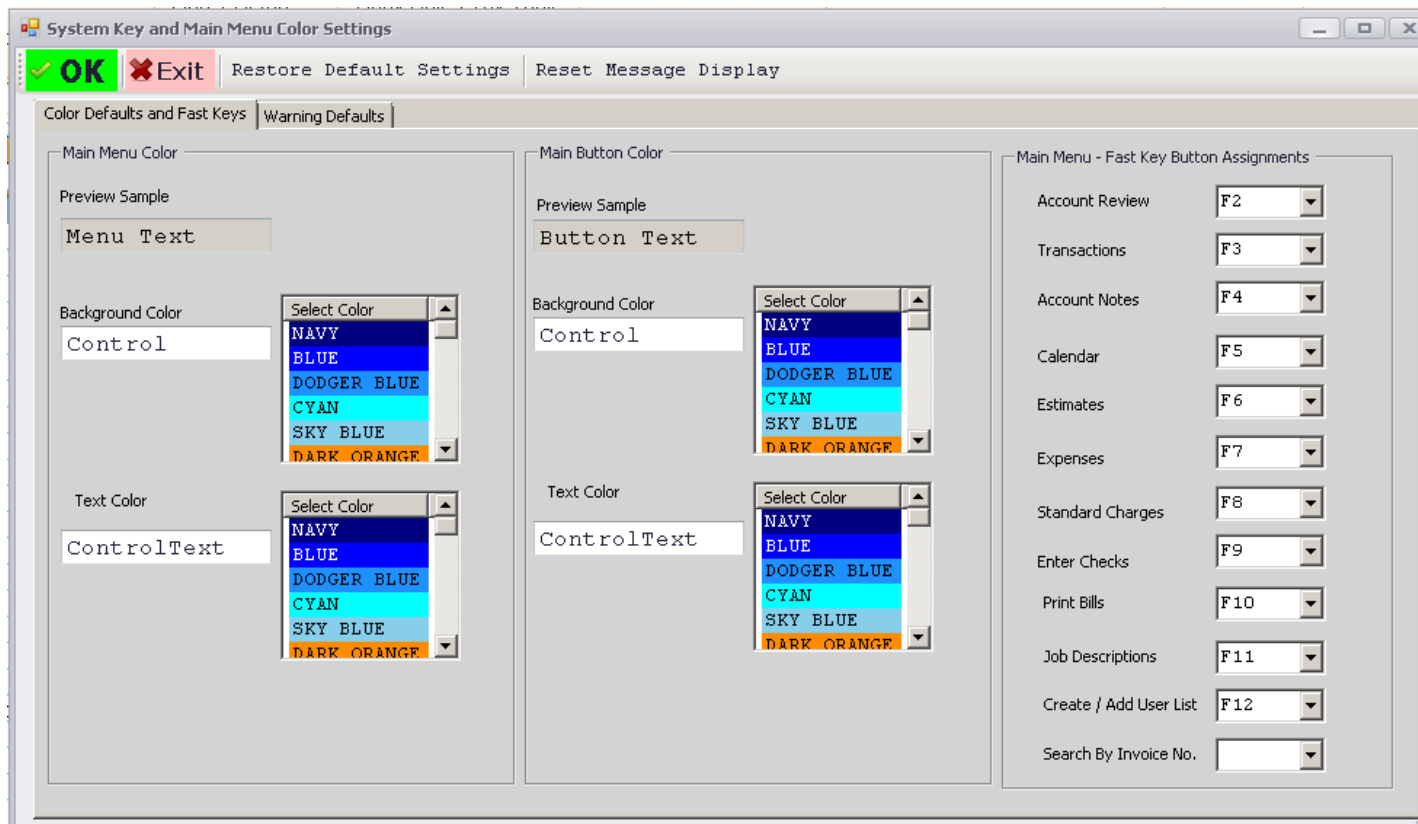
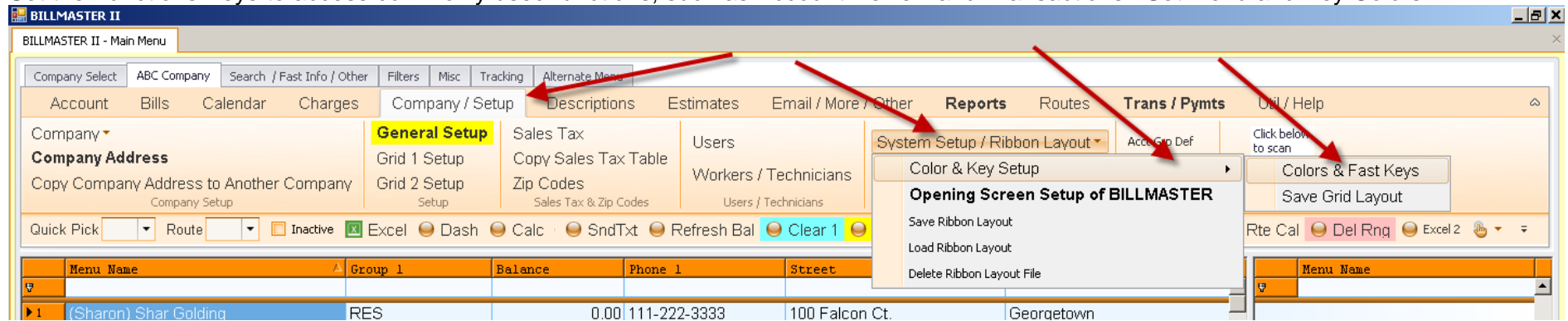
Main Menu – Setup – Colors & Fast Keys

[VIDEO – Main Color Setup](#)

[VIDEO – Change Main Menu Style](#)

[VIDEO – Custom Dashboard](#)

Set the Functions Keys to access commonly used functions, such as Account Review and Transactions. Set Menu and Key Colors



Main Menu – Google Maps

Access a map instantly with by selecting an account on the main menu, Right Click and select **Map / Web**

You can also select from the Estimates / More Menu and select **Web / Google Maps**

Web Site

Go Refresh Map FastSupport.com View Schedule Create Appointment

Map Points Setup Route

Point A Clear

126 Valley Road

glen rock NJ 07452

Point B Clear

Anderson Ken Emma

77 Sun Valley Rd.

Ramsey NJ 07446

Point C Clear

Point D Clear

Point E Clear

Point F Clear

Setup to enter in starting address

Web Images Videos Maps News Shopping Gmail more

csbillmaster@gmail.com | My Profile | My Account | Help | Sign out

Google maps Valley Road,glen rock,NJ,07452 to: (77 Sun Valley Rd ,Ramsey,NJ,07446) Search Maps Show search options

Get Directions

Select the Route Tab to Map a Route

By car Get Directions

Also available: Public Transit

Driving directions to 77 Sun Valley Rd, Ramsey, NJ 07446

Suggested routes

Route	Distance	Time
Godwin Ave and Wyckoff Ave	8.8 mi	20 mins
Crescent Ave	8.7 mi	20 mins
NJ-208 N and Wyckoff Ave	9.9 mi	20 mins

126 Valley Rd
Glen Rock, NJ 07452

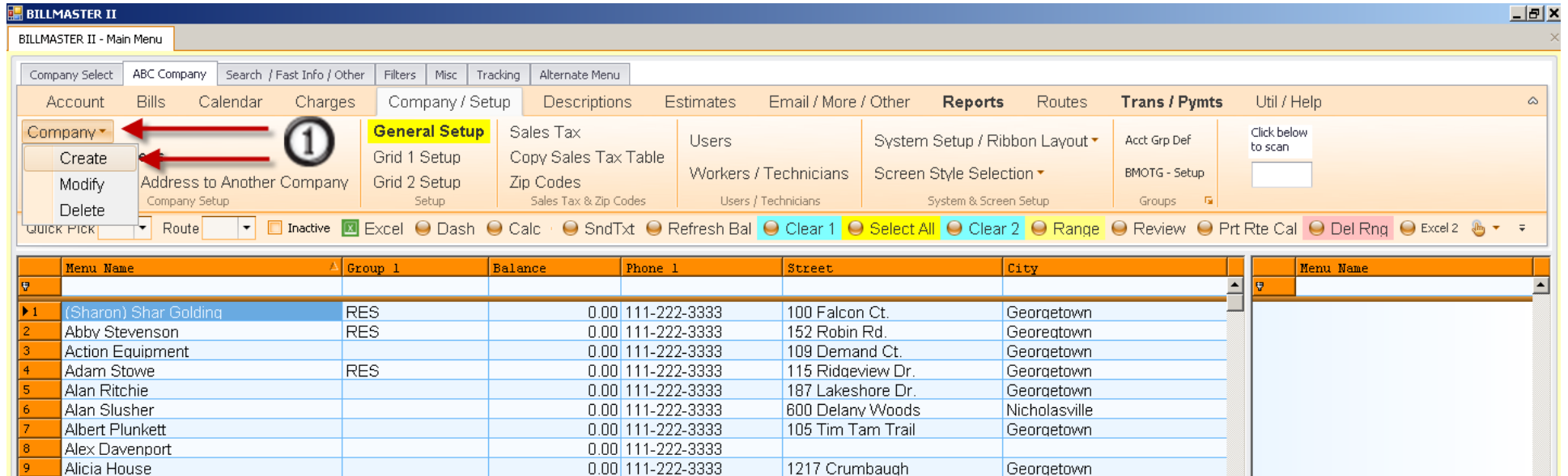
- Head south on Valley Rd toward Rock Rd 49 ft
- Turn right at Rock Rd 0.7 mi
- Turn right at Lincoln Ave 1.2 mi
- Turn left at Godwin Ave 3.5 mi
- Continue onto Wyckoff Ave 2.4 mi

©2009 Google - Map data ©2009 Google - Terms of Use Report a problem

Company / Line of Business

Create Company / Line of business

To create a new company, select Create from the Company / Setup Menu



Create Company – Name, Business Type

Enter your company name and Press Save

The dialog box titled 'Create Company / Line of Business' has a 'Save' button (green) and an 'Exit' button (red). Below the buttons, there is a blue instruction text: 'Enter a new company name and select business type then press Save'. There are two input fields: 'Name' with the placeholder text 'Any Company Name Can be entered here' and 'Business Type' with a dropdown menu showing '0 - General'.

Create Company – Name and Address

1. Select Company Address from the Main Menu. This name and address will be used on bill and other documents.
2. Enter the name to be used on check payments to the company.

The screenshot shows the BILLMASTER II Main Menu with the 'Company Address' menu item selected. A red arrow points to this menu item, labeled with a circled '1'. The 'Company Settings' dialog box is open, showing the 'General Setup' tab. The 'Business Type' is set to '4 - Pest Control'. The 'Primary Company Address' fields are filled with 'ABC Company', '100 Main Street', 'Anytown USA', and '444-555-1212'. The 'Make Payment to' field is filled with 'ABC Company'. The 'Secondary Company Address' fields are empty. The 'Billing Image / Logos' section has three empty fields labeled 'Image 1', 'Image 2', and 'Image 3'. A red arrow points from the 'Company Address' menu item to the 'Company Settings' dialog box, labeled with a circled '2'.

Menu Name	Group 1	Balance
1 (Sharon) Shar Golding	RES	
2 Abby Stevenson	RES	
3 Action Equipment		
4 Adam Stowe	RES	
5 Alan Ritchie		
6 Alan Slusher		
7 Albert Plunkett		
8 Alex Davenport		
9 Alicia House		
10 Allison Briggs		13
11 Ally & Jeremy Barnett		
12 Amanda Kinman		
13 Amanda Neace		
14 Amanda Shapaka		
15 Amanda Thorpe		10
16 Amazing Pest Control	CUST	
17 Amber Ott		
18 Amy Baron		
19 Amy Barron		
20 Amy Barron (Remax Creative)		
21 Amy Barron 001		
22 Amy Barron 002		
23 Amy Barron 003		
24 Amy Canham		
25 Amy Clark		
26 Amy Conham	CUST	
27 Amy Crist	RES	
28 Amy Curtis	RES	
29 Amy Guenther		

Record 1 of 1534

29239.59

Record 0 of 0

Account

[VIDEO - Account Create](#)

[VIDEO – Account Create – Pest Control](#)

To create an account, either press Create Account from the Main Menu Fast Keys or Create New Account from the Account Menu.

The screenshot displays the BILLMASTER II Main Menu. The 'Account' menu is selected, showing options like 'F2 - Review / Modify', 'Create New Account', 'Standard Charges', 'Notes', 'Delete Account', 'Copy (Duplicate) Account', 'Copy Accounts to Another Company', 'Merge Transactions to Company', 'Standard Charge Updates', 'Update Periodic Schedule', and 'Click below to scan'. The 'Create New Account' button is highlighted with a red arrow. Below the menu is a toolbar with various icons and buttons. The main window shows a table of accounts with columns: Group 1, Balance, Phone 1, Street, City, and Menu Name. The first row is highlighted with a circled '1'.

	Group 1	Balance	Phone 1	Street	City	Menu Name
1	(Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2	Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3	Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4	Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5	Alan Ritchie		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6	Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
7	Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8	Alex Davenport		0.00	111-222-3333		
9	Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10	Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11	Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12	Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13	Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14	Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15	Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16	Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17	Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18	Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19	Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
20	Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown

Account Create – Initial Entry

Enter the name, address and phone number information for the account

1. Account Group – You can create as many groups as you want to further organize and sub divide your account group.
2. The account status is the payment status for your account. Yellow is later payer. Red is delinquent.
3. Press Save and add another if you want to continue to create accounts.

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | Descriptions | Estimates | Email / More / Other | **Reports** | Routes | Trans / Pymts | Util / Help

F2 - Review / Modify | Create New Account | Standard Charges | Notes | Delete Account | Copy (Duplicate) Account | Standard Charge Updates | Click below to scan

Transactions | Account Notes | Delete Account | Copy Accounts to Another Company | Update Periodic Schedule | Merge Transactions to Company | Copy Functions | Updates

Quick Pick: [Dropdown] | Route: [Dropdown] | Inactive | Excel | Dash | Calc | SndTxt | Refresh Bal | Clear 1 | Select All | Clear 2 | Range | Review | Prt Rte Cal | Del Rng | Excel 2

Menu Name	Group 1	Balance	Phone 1	Street	City
1 (Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2 Abby Stevenson	RES	0.00	111-222-3333	150 Robin Rd.	Georgetown
3 Action Equipment					wn
4 Adam Stowe	RES				wn
5 Alan Ritchie					wn
6 Alan Slusher					ille
7 Albert Plunkett					wn
8 Alex Davenport					wn
9 Alicia House					wn
10 Allison Briggs					wn
11 Ally & Jeremy Barnett					wn
12 Amanda Kinman					wn
13 Amanda Neace					wn
14 Amanda Shapaka					wn
15 Amanda Thorpe					wn
16 Amazing Pest Control	CUST	0.00	111-222-3333	822 Fallsade Ave.	Teaneck
17 Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18 Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19 Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
20 Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21 Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22 Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23 Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
24 Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
25 Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26 Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27 Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28 Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29 Amy Guenther		0.00	502-868-0902	43 Richmond Ave.	Lexington

Record 1 of 1534

29239.59

Record 0 of 0

Enter Account Menu Name and Press OK

Cancel | Account Default Settings

Enter the Menu Name for the account below and press OK
Example: SMITH, JOHN

First Name: [Text Box]

Last Name: [Text Box]

Account Menu Name: [Text Box]

OK

Account – Modify, Inactive, Account Status

The account screen provides access to all configurations for your accounts, including pricing for services.

To set services and options for the account, select the check boxes as needed. When an account is marked as inactive, they can be removed from route lists. A warning will then be displayed when the account is accessed in the future.

1. The Menu Name is only seen by you. It is sorted and allows you to select customers from the Main Menu. If you have two customers with the same last name, you can give different menu names.
2. If the active becomes inactive check this box.
3. Standard Charges. Set up individual prices for each customer regular services. You only have to do this once.
4. Routes that the customer belongs to.

Fast Keys | Setup / Chemical / WDI / Other | Documents

Save **Cancel** Previous 1 of 1 Next **Account Notes** **Images**

28 Calendar **Transactions** Apply Tax to Std Ch **Standard Ch** **Calls** Job Descriptions History

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info

Menu Name: Able, Andy

Letter: A Customer Code: 3113 Group / Type 1: RES

Status: Green Group / Type 2: Group / Type 3:

Current Balance: 160.50

☒ Apply Service Charge if needed? ☐ Inactive Account ☐ Alert

☒ Charge Taxes? ☒ Send Paper ☐ Contact

Tax Defaults: NJ ☒ Send e-Bill ☐ Vendor

☐ Option 1 ☐ Estimate

☐ No Label/Mailer ☐ Bulk

Bill To | Job Location

Bill to:

Company:

Personal: Andy Able House #: 68

Street: 68 New County Road

CSZ: Monsey NY 10952

Standard Charges

Code	Description	Price	Type	T1
7	Monthly Service	150.00	1	NJ

Phone Numbers

Home: 745-348-4888 Cell 2:

Office: Cell 3:

Cell 1:

Routes

Add to Route Route Notes Delete from Route Change Order

Name:

Customers - Addl Leaves John

Account – Standard Charges

VIDEO – Standard Charges

Fast Keys

Routes

Service Details

Setup / Other

OK

Cancel

Previous

1 of 1

Next

Clear Selected Accounts

Complete Schedule

Print Ticket

Calendar

Charge Taxes: NO

Next Appointment: 7 :Monthly Service

Default Tech / Worker: Glen

Price Table

Packages / Programs

Menu Name : Alan Rich

4/14/2015 11:00:00 AM

Calc Prices

Apply Package / Program

Codes to Review

Previous

1 to 10

Next

★

Find	Code	Description	Qty	Price	Delete
i	7	Monthly Service		55.00	⊖
i	225	Termite Inspection		75.00	⊖
i					⊖
i					⊖
i					⊖
i					⊖
i					⊖
i					⊖
i					⊖
i					⊖
i					⊖

Recurring Schedule

Service Agreement

Warranty / Other

Start Date	Frequency	AM / PM	Start Hour	Start Min	Dur Minutes	Target Pests	Chem Used	Price History
4/14/2015	Monthly	AM	11	0	0	German Cockroach	🧪	💰
	One Time	AM	8	0	60		🧪	💰
							🧪	💰
							🧪	💰
							🧪	💰
							🧪	💰
							🧪	💰
							🧪	💰
							🧪	💰
							🧪	💰
							🧪	💰

Account – Updates

1. You can update the Standard Charges for accounts for price changes, by using the Account Update features. It allows you to select accounts and apply a update to each account, without having to go into each account individually. You can also change settings such as Group Code, Account Status, etc.

The screenshot displays the BILLMASTER II Main Menu. A red arrow points to the 'Alternate Menu' tab, which is labeled with a circled '1'. The 'Account' menu is open, showing 'Account Updates' and 'Standard Charge Updates'. The 'Standard Charge Updates' submenu is also open, showing options like 'Set Default Standard Charge Based On Account Default', 'Set Default Standard Charge for Group', 'Update by Percentage', 'Update by Fixed Amount', 'Standard Charge History - Create', 'Standard Charge History - Delete', 'Overwrite Standard Charge', 'Update / Add Std Charges to Multiple Account', 'Update Std Charges based on Size', 'Copy Std Ch From One Acct To Another (Pick Copy TO Accts First)', and 'Update Standard Charge - Months to Schedule'.

The main window displays a list of accounts with columns for Menu Name, Account Type, Group Code, Standard Charge, and Address. The list includes accounts such as Ally & Jeremy Barnett, Amanda Kinman, Amanda Neace, Amanda Shapaka, Amanda Thorpe, Amazing Pest Control, Amber Ott, Amy Baron, Amy Barron, Amy Barron (Remax Creative), Amy Barron 001, Amy Barron 002, Amy Barron 003, Amy Canham, Amy Clark, Amy Conham, Amy Crist, Amy Curtis, and Amy Guenther.

The status bar at the bottom indicates 'Record 5 of 1534' and '29239.59'.

Account – Sales Tax / Tax Codes

1. If the account pays Sales Tax, check the Box to Charge Taxes. Select the Tax Default Code. Then all of the Standard Charges should have the Tax Code. If they do not press Apply Tax to Standard Charge button to apply the Tax Code Default.

Able, Andy

Fast Keys | Setup / Chemical / WDI / Other | Documents

1 of 1

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info

Menu Name: Able, Andy

Letter: A Customer Code: 3113 Group / Type 1: RES

Status: Green Current Balance: 160.50

☒ Apply Service Charge if needed?
 ☐ Inactive Account
 ☐ Alert

☒ Charge Taxes?
 Tax Defaults: NJ
 ☒ Send Paper
 ☐ Contact

☒ Send e-Bill
 ☐ Vendor

☐ Option 1
 ☐ Estimate

☐ No Label/Mailer
 ☐ Bulk

Bill To | Job Location

Bill to:

Company:

Personal: Andy Able

Street: 68 New County Road 68

CSZ: Monsey NY 10952

Phone Numbers

Home: 745-348-4888 Cell 2:

Office: Cell 3:

Cell 1:

Standard Charges

Code	Description	Price	Type	TL
7	Monthly Service	150.00	1	NJ

Routes

Add to Route | Route Notes | Delete from Route | Change Order

Name:

Customers - Addl Leaves John

If the account pays Sales Tax, check the Box to Charge Taxes. Select the Tax Default Code. Then all of the Standard Charges should have the Tax Code. If they do not press Apply Tax To Std Ch button to apply the Tax Code Default.

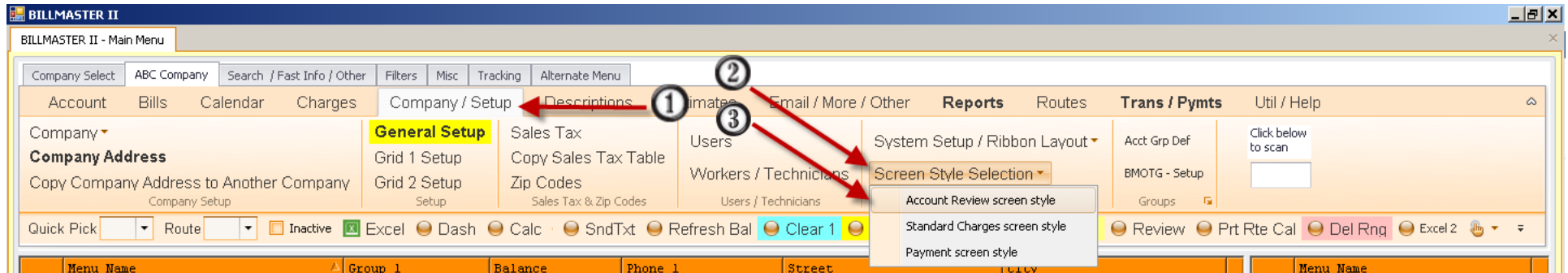
Account Review – Screen Style

[VIDEO – Account Review 01](#)

[VIDEO – Account Review – Pest Control](#)

Select from different Account Screen Styles to display your account information.

The Account Screen Style is selected from the Company / Setup Menu – Account Screen Style



Style #101– General Info

Fast Keys: Setup / Chemical / WDI / Other | Documents

Save Cancel Previous 1 of 1 Next Account Notes Images

Calendar Transactions Apply Tax to Std Ch Standard Ch Calls Job Descriptions History

Menu Name / Taxes / Filters Contact / e-mail / CC Info Site Info

Menu Name: Andrew, Jackson

Letter: A Customer Code: 4 Group / Type 1: RES

Status: Yellow Group / Type 2: Group / Type 3:

Current Balance: 398.48

Apply Service Charge if needed? ☒ Charge Taxes? ☒ Tax Defaults: NJ

Inactive Account ☐ Alert ☐ Send Paper ☒ Send e-Bill ☐ Option 1 ☐ No Label/Mailer ☐ Bulk

Bill To: Job Location

Bill to:

Company:

Personal: Mr. and Mrs. Andrew Jackson House #:

Street: 4787 Oak Street 4787

CSZ: Mahwah NJ 07430

Phone Numbers:

Home: 241-236-9149 Cell 2: --

Office: 222-222-2222 Cell 3: --

Other: --

Standard Charges:

Code	Description	Price	Type	T1
7	Monthly Service	150.00	1	NJ
101	Fertilizer Step 1 - Early Sp...	100.00	1	NJ

Style #101

Routes:

Add to Route Route Notes Delete from Route Change Order

Name:

Mowing - Thursday

Style #102 – General Info

Andrew, Jackson

Fast Keys | Setup / Chemical / WDI / Other | Documents |

Save

Cancel

Previous 1 of 1

Next

Account Notes

Images

28 Calendar

Transactions

Apply Tax to Std Ch

Standard Ch

Calls

Job Descriptions

History

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info |

Menu Name

Andrew, Jackson

☒ Apply Service Charge if needed?

☐ Inactive Account

☐ Alert

Letter

A

Customer Code

4

Group / Type 1

RES

☒ Charge Taxes?

Send Paper

☐ Contact

Status

Yellow

Group / Type 2

Tax Defaults

NJ

Send e-Bill

☐ Vendor

Current Balance

398.48

Group / Type 3

Option 1

☐ Estimate

☐ No Label/Mailer

☐ Bulk

Bill to

Company

Personal

Mr. and Mrs. Andrew Jackson

House #

Street

4787 Oak Street

4787

CSZ

Mahwah

NJ

07430

Job Location

Prev Addr 2 of 3 Next Addr

Mr. and Mrs. Andrew Jackson

House #

569 West 9th Street

569

Mahwah

NJ

07430

Phone Numbers

Home

241-236-9149

Cell 2

--

Office

222-222-2222

Cell 3

--

Other

--

Standard Charges

Code	Description	Price	Type	Tl
7	Monthly Service	150.00	1	NJ
101	Fertilizer Step 1 - Early Sp...	100.00	1	NJ

Style #102

Routes

Add to Route

Route Notes

Delete from Route

Change Order

Name

Mowing - Thursday

Style #103 – General Info

Andrew, Jackson

Fast Keys | Setup / Chemical / WDI / Other | Documents

Save Cancel Previous 1 of 1 Next Acct Notes Images

Calendar Transactions Apply Tax to Std Ch Standard Ch Calls Job Desc History

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info

Menu Name: Andrew, Jackson

Letter: A Customer Code: 4 Group / Type 1: RES

Status: Yellow Group / Type 2: Group / Type 3:

Current Balance: 398.48

☒ Apply Service Charge if needed? ☐ Inactive Account ☐ Alert

☒ Charge Taxes? ☒ Send Paper ☐ Contact

Tax Defaults: NJ ☒ Send e-Bill ☐ Vendor

☐ Option 1 ☐ Estimate

☐ No Label/Mailer ☐ Bulk

Phone Numbers | Bill To | Job Location | Routes

Home	241-236-9149	Cell 2	--
Office	222-222-2222	Cell 3	--
Other	--		

Standard Charges

Code	Description	Price	Type	T1
7	Monthly Service	150.00	1	NJ
101	Fertilizer Step 1 -...	100.00	1	NJ

Style #103

Style #104 – General Info

Andrew, Jackson

Fast Keys | Setup / Chemical / WDI / Other | Documents

☒ Save
 ☒ Cancel
 Previous 1 of 1
 Next
 Account Notes
 Images

28 Calendar
 Transactions
 Apply Tax to Std Ch
 Standard Ch
 Calls
 Job Descriptions
 History

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info

Menu Name: Andrew, Jackson

Letter: A Customer Code: 4 Group / Type 1: RES

Status: Yellow Group / Type 2:

Current Balance: 398.48 Group / Type 3:

☒ Apply Service Charge if needed?
 ☐ Inactive Account
 ☐ Alert

☒ Charge Taxes?
 ☒ Send Paper
 ☐ Contact

Tax Defaults: NJ
 ☒ Send e-Bill
 ☐ Vendor

☐ Option 1
 ☐ Estimate

☐ No Label/Mailer
 ☐ Bulk

Bill To | Job Location | Routes

Bill to

Company

Personal: Mr. and Mrs. Andrew Jackson House #

Street: 4787 Oak Street 4787

CSZ: Mahwah NJ 07430

Phone Numbers

Home	241-236-9149	Cell 2	--
Office	222-222-2222	Cell 3	--
Other	--		

Standard Charges

Code	Description	Price	Type	T1
7	Monthly Service	150.00	1	NJ
101	Fertilizer Step 1 - Early Sp...	100.00	1	NJ

Style #104

Style #105 – General Info

Andrew, Jackson

Fast Keys | Setup / Chemical / WDI / Other | Documents

1 of 1

Menu Name / Taxes / Filters | Contact / e-mail / CC Info

Menu Name: ☒ Apply Service Charge if needed?

Status: Group / Type 1: ☒ Charge Taxes?

Current Balance: Group / Type 2: Tax Defaults: Group / Type 3:

☐ Alert ☐ Contact ☐ Vendor ☐ Estimate ☐ Bulk
☐ Inactive Account ☒ Send Paper ☒ Send e-Bill ☐ Option 1 ☐ No Label/Mailer

Site Info

Label	Value	Label	Value
Total Area	<input type="text" value="11"/>	label 1	<input type="text" value="map1"/>
Turf Area	<input type="text" value="10700"/>		<input type="text" value="plan1"/>
Yearly Price	<input type="text" value="13"/>		<input type="text" value="countycode1"/>
Per Service	<input type="text" value="14"/>		
	<input type="text" value="map1"/>		

Bill to

Company:

Personal: House #:

Street:

CSZ:

Phone Numbers

Home:

Office:

Other:

Cell 2:

Cell 3:

Standard Charges

Code	Description	Price	Type	T1
7	Monthly Service	150.00	1	NJ
101	Fertilizer Step 1 - Early Sp...	100.00	1	NJ

Job Location

Prev Addr 2 of 3 Next Addr

Company:

Personal: House #:

Street:

CSZ:

Change Order | Route Notes | Add to Route | Delete from Route

Name

Mowing - Thursday

Style #105

Style #301 - Fertilization

Alicia House

Fast Keys

Save

Cancel

Previous

1 of 1

Next

Account Notes

Print Work Order / Route Sheet

Images

Price Table

Calendar

Transactions

Apply Tax to Std Ch

Standard Ch

Set Std Ch Pricing

Job Desc

History

Calc Prices

Menu Name / Taxes / Filters

Contact / e-mail / CC Info

Site Info

Menu Name

Alicia House

Letter

A

Status

Green

Current Balance

0.00

Group / Type 1

Group / Type 2

Group / Type 3

☐ Inactive Account
 ☐ Print Tot Bal
 ☐ Print Late Fee
 ☒ Apply Service Charge if needed?
 ☐ Send Paper
 ☐ Send e-Bill
 ☐ Option 1
 ☐ No Label/Mailer
 ☐ e-mail Appt
 ☐ Charge Taxes?
 ☐ Alert
 ☐ Contact
 ☐ Vendor
 ☐ Estimate
 ☐ e-Mail Pymt Recv
 ☐ ALL
 ☐ Front
 ☐ Right
 ☐ Left
 ☐ Rear
 ☐ Pre Pay
 ☐ Call First
 ☐ Hold Services
 Lawn Size

Bill To

Job Location

Routes

Company

Personal

Resident

House #

Street

1217 Crumbaugh

1217

CSZ

Georgetown

KY

40324

Notes

☐ Copy Bill To Address To Job Location (This will overwrite existing Job Location if Blank)

Phone Numbers

HOME

111-222-3333

OTHER

111-222-3333

OFFICE

111-222-3333

CELL

111-222-3333

FAX

111-222-3333

Standard Charges

Code	Description	Price	Type	T1
142	Fleas Second Follow Up Treat...	62.50	0	

Style #301

Style #401 – Pest Control

Alan Rich

Fast Keys | Setup / Chemical / WDI / Other | Documents

Save & Exit Save & Refresh Cancel Previous 1 of 1 Next

28 Fast Calendar View Transactions Apply Tax to Std Ch Standard Ch Invoices

Account Notes Calendar Chemical Records WDI Forms

Job Descriptions Schedule Images

Menu Name / Taxes / Filters Contact / e-mail / CC Info / PO No. Site Info Comments / Service Details Addresses

Menu Name Alan Rich

Letter A

Current Balance 0.00

☒ Apply Service Charge if needed?

☐ Charge Taxes?

Group / Type 1 RES

Resident Group / Type 2

Resident Group / Type 3

Tax Defaults

Tax ID

Tax Exp 1/1/1980

Tech Notes / Remarks

☐ Inactive Account

Tech / Worker Glen

Sales Person

Frequency Default One Time

Target Pest

Bill To:

Company

Personal Resident

Street House #

187 Lakeshore Dr. 187

Georgetown KY 40324

Phone Numbers

	1	2	3	4	5
HOME	111-222-3333				
OFFICE	111-222-3333				
FAX	111-222-3333				
OTHER	111-222-3333				
CELL	111-222-3333				

Standard Charges

Code	Description	Price	Next Service	Last Char
225	Termite Insp...	75.00		

Style #401

Job Location

Prev Addr 2 of 2 Next Addr

Resident House #

187 Lakeshore Dr. 187

Georgetown KY 40324

Cross Street / Directions

County

Map Corridate

Zone / Time

Name

Create Route

Add to Route

Delete from Route

Route Notes

Change Order

Style #501 – Pest Control

Alan Rich

Fast Keys | Setup / Chemical / WDI / Other | Documents

1 of 1

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info

Menu Name:

Letter:

Status: Resident

Current Balance: Resident

Group / Type 1: Tax Defaults:

Group / Type 2: BDS

Group / Type 3:

☒ Apply Service Charge if needed?
 ☐ Inactive Account
 ☐ Alert
 ☐ Hold Services
 Property Size:

☐ Charge Taxes?
 ☐ Send Paper
 ☐ Contact
 ☐ e-Mail Pymt Recv

☐ Send e-Mail
 ☐ Vendor
 ☐ Print Tot Bal

☐ Option 1
 ☐ Estimate
 ☐ e-mail Appt

☐ No Label/Mailer
 ☐ Prnt Late Fee

Bill To:

Company:

Personal:

Resident:

Street: House #:

187 Lakeshore Dr. 187

City, State, Zip Code: KY 40324

☐ Copy Bill To Address To Job Location (This will overwrite existing Job Location if Blank)

Phone Numbers

HOME	111-222-3333
OFFICE	111-222-3333
FAX	111-222-3333
OTHER	111-222-3333
CELL	111-222-3333

Standard Charges

Code	Description	Price	Next	Type
225	Termite Inspection	75.00		0

Style #501

Job Location

Prev Addr 2 of 2 Next Addr

Resident: House #:

187 Lakeshore Dr. 187

Georgetown KY 40324

Cross Street Information Below

County:

Map Corridinate:

Zone:

Name:

Create Route

Add to Route

Delete from Route

Route Notes

Change Order

Style #601 – Irrigation

Fast Keys Setup / Chemical / WDI / Other Documents									
Save	Cancel	Previous	1	of	1	Next	Account Notes	Images	Calls
Calendar	Transactions	Apply Tax to Std Ch	Standard Ch	Invoices	Job Descriptions	History			

Menu Name / Taxes / Filters Contact / e-mail / CC Info Site Info											
Menu Name: Alan Rich					<input type="checkbox"/> Send Paper <input type="checkbox"/> Send e-Mail <input checked="" type="checkbox"/> Apply Service Charge if needed? <input type="checkbox"/> Charge Taxes?		<input type="checkbox"/> Hold Services <input type="checkbox"/> Inactive Account <input type="checkbox"/> Option 1 <input type="checkbox"/> Alert Rain Sensor <input type="checkbox"/> Valve Type <input type="checkbox"/>		<input type="checkbox"/> e-Mail Pymt Recv <input type="checkbox"/> e-mail Appt <input type="checkbox"/> Print Late Fee <input type="checkbox"/> Hunter Remote <input type="checkbox"/> Outside Shut Off <input type="checkbox"/> Box Access <input type="checkbox"/> Inside Drain		
Letter: A	Group / Type 1:	Resident	Group / Type 2:	Tax Defaults:		Rate:		Clock:		Location:	
Status: Green	Group / Type 3:	Resident	BIDS			Zones:		Blow Out Loc:			
Current Balance: 0.00											

Bill to					
Company: [Blank]					
Personal: Resident House #: [Blank]					
Street: 187 Lakeshore Dr.					
CSZ: Georgetown KY 40324					
<input type="checkbox"/> Copy Bill To Address To Job Location (This will overwrite existing Job Location if Blank)					

Job Location					
Prev Addr 2 of 2 Next Addr					
Company: [Blank] Cross Street Information Below					
Personal: Resident					
Street: 187 Lakeshore Dr. House #: 187					
CSZ: Georgetown KY 40324					

Standard Charges					
Code	Description	Price	Type	Tl	
225	Termite Inspection	75.00	0		

<h2>Style #601</h2>

Phone Numbers			
HOME	111-222-3333	OTHER	111-222-3333
OFFICE	111-222-3333	CELL	111-222-3333
FAX	111-222-3333		

Routes	
Add to Route	Route Notes Delete from Route Change Order Create Route
Name	

Style #611 – Irrigation

Alan Rich
?
X

Fast Keys
Setup / Chemical / WDI / Other
Documents

Transactions
Standard Charges
Trans / Std Ch

Account Notes
Images
History
Notes

Job Descriptions
Job Descriptions

Apply Tax To Std Ch
Sales Tax Setup
Tax

Calendar
Invoices - Text
Print Account Info
Other

Style #611

✓ Save
✗ Cancel
◀ Previous
1 1
▶ Next

General Information
General Info Cont.
Charges
Sprinkler Info
Edit Zone Info
Lighting Info
Routes
Credit Card Info
Site Info

Billing Information

Menu Name: Alan Rich

First Name: Resident

Last Name: Resident

Bill To:

Address 1: Resident

Address 2: 187 Lakeshore Dr. House # 187

City: Georgetown

State: KY

Zip Code: 40324 Zip Code Plus:

Home Phone: HOME 111-222-3333

Cell Phone #1: OFFICE 111-222-3333

Cell Phone #2: FAX 111-222-3333

Attention:

Home Email:

Last Invoice: 0.00 195 Quarterly

Last Invoice Date: 03/02/15

Balance: 0.00

Work Information

☐ Use same as billing

Job Location:

Address 1: Resident

Address 2: 187 Lakeshore Dr. House # 187

City: Georgetown

State: KY

Zip Code: 40324 Zip Code Plus:

Work Email:

Longitude: -84.5656305

Latitude: 38.3049562

Bus Phone#1: OTHER 111-222-3333

Bus Phone#2: CELL 111-222-3333

Bus FAX:

SQ. Feet:

Zone:

Cross Street:

Map:

Town Section:

Referred By:

Email Info

☐ Pay By Credit Card?

☐ Email the Statement ?

Monthly Amount: 0.00

Billing Email:

☐ e-Mail Pymt

☐ e-mail Appt

Style #701 – Pool and Spa

Fast Keys Setup / Chemical / WDI / Other Documents									
Save	Cancel	Previous	1	of	1	Next	Account Notes	Images	Calls
Calendar	Transactions	Apply Tax to Std Ch	Standard Ch	Invoices	Job Descriptions	History			

Menu Name / Taxes / Filters		Contact / e-mail / CC Info	Site Info
-----------------------------	--	----------------------------	-----------

Menu Name	Alan Rich				<input checked="" type="checkbox"/> Apply Service Charge if needed?	<input type="checkbox"/> Inactive Account	<input type="checkbox"/> e-Mail Pymt Recv	Choline	<input type="text"/>
Letter	A	Group / Type 1	<input type="text"/>		<input type="checkbox"/> Alert	<input type="checkbox"/> e-mail Appt		Ph	<input type="text"/>
Status	Green	Resident	Group / Type 2	<input type="text"/>	<input type="checkbox"/> Charge Taxes?	<input type="checkbox"/> Option 1	<input type="checkbox"/> Prnt Late Fee	Alkalinity	<input type="text"/>
Current Balance	0.00	Resident	Group / Type 3	<input type="text"/>	Tax Defaults	<input type="text"/>	Pool Condition	Hardness	<input type="text"/>
					BDS		Pump Type	Stabilizer	<input type="text"/>
							Worker / Tech	Glen	<input type="text"/>

Bill to			
Company	<input type="text"/>		
Personal	Resident	House #	<input type="text"/>
Street	187 Lakeshore Dr.		187
CSZ	Georgetown	KY	40324
<input type="checkbox"/> Copy Bill To Address To Job Location (This will overwrite existing Job Location if Blank)			

Job Location			
Prev Addr 2 of 2 Next Addr			
Company	<input type="text"/>		
Personal	Resident	House #	<input type="text"/>
Street	187 Lakeshore Dr.		187
CSZ	Georgetown	KY	40324

Code	Description	Price	Next Service	Last Char
225	Termite Insp...	75.00		

Style #701

Phone Numbers			
HOME	111-222-3333	OTHER	111-222-3333
OFFICE	111-222-3333	CELL	111-222-3333
FAX	111-222-3333		

Routes			
Add to Route	Route Notes	Delete from Route	Create Route
Name			

51

Style #901 – Plumbing

Alan Rich

Fast Keys | Setup / Other | Documents

1 of 1

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | General Info | Assemblies

Menu Name: Alan Rich
Letter: A
Status: Green
Current Balance: 0.00
First Name: Resident
Last Name: Resident
Group / Type 1:
Group / Type 2:
Group / Type 3:
☒ Apply Service Charge if needed?
☐ Charge Taxes?
Tax Defaults:
☐ Hold Services
☐ Print Tot Bal
☐ e-mail Appt
☐ Inactive Account
☐ Alert
☐ Option 1
☐ Send Paper
☐ Bulk
☐ Prnt Late Fee
☐ e-Mail Pymt Recv
☐ Contact
☐ Vendor
☐ Estimate
☐ Send e-Mail

Bill To | Job Location
Company:
Personal: Resident
Street: 187 Lakeshore Dr.
CSZ: Georgetown KY 40324
☐ Copy Bill To Address To Job Location (This will overwrite existing Job Location if Blank)

Phone Numbers
HOME: 111-222-3333
OFFICE: 111-222-3333
FAX: 111-222-3333
OTHER: 111-222-3333
CELL: 111-222-3333

Special Notes
Style #901

Note Address Zero is the Bill To Address
Change Site Order
Load Default Labels
Save Site Info
Delete Job Location

0 - Resident , 187 Lakeshore Dr. , Georgetown KY 40324
1 - Resident , 187 Lakeshore Dr. , Georgetown KY 40324

Label	Value	Date	Zone No.	Room / Section
▼				
*				

Record 0 of 0
☒ (ID)

Edit Filter

Style #915 – Loan Management

Alan Rich

Fast Keys | Setup / Chemical / WDI / Other | Documents

Save
 Cancel
 Transactions
 Previous 1 of 1 Next
 Print Statement
 Loan Worksheet
 Account Notes
 Images

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info | Other | Lists

Menu Name: Alan Rich

First Name: Resident Last Name: Resident Date of Birth: 01/01/1980

e-mail address:

Current Balance: 0.00 Group: Status: Green

SSN:

Phone Numbers:

HOME	111-222-3333
OFFICE	111-222-3333
FAX	111-222-3333
OTHER	111-222-3333

☐ Inactive Account
☐ Send e-Mail
☐ Alert
☐ e-Mail Pymt Recv
☐ Print Tot Bal
☐ Print Late Fee

Loan Data:

Calculate Loan

Minimum Payment: 0.00

Enter Payment

Calculate Additional Charges

Create Loan Schedule in Transaction File

Clear Charges

Loan:

Loan Number:

Amount of Loan: 0.00

Rate of Interest: 0.2395 = 23.95 %

Loan Duration: No. of Months

Loan Start Date: 01/01/1980

FICO Score:

Investor:

Vehicle:

Make: Year:

VIN:

Purchased From:

Home Address

Bill to:

Company:

Personal: Resident House #:

Street: 187 Lakeshore Dr. 187

CSZ: Georgetown KY 40324

☐ Copy Home Address To Job Location (This will overwrite existing Work Address if Blank)

Work Address:

Resident House #:

187 Lakeshore Dr. 187

Georgetown KY 40324

Style #915

Style #916 – Publishing

Alan Rich

Fast Keys | Setup / Chemical / WDI / Other | Documents

Save Cancel Transactions Previous 1 of 1 Next Print Statement Standard Ch Account Notes Images

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info | Other | Lists

Menu Name: Alan Rich

First Name: Resident Last Name: Resident

e-mail address:

Current Balance: 0.00 Group: Date of Birth: 01/01/1980

SSN:

Phone Numbers:

HOME	111-222-3333
OFFICE	111-222-3333
FAX	111-222-3333
OTHER	111-222-3333

☐ Inactive Account

☐ Send e-Mail

☐ Alert

☐ e-Mail Pymt Recv

☐ Print Tot Bal

☐ Print Late Fee

Subscription

Start Date: 01/01/1980

Duration: No. of Months Zero = Perpetual

Drag a column header here to group by that column

Code	Description	Date
*		

Style #916

Record 0 of 0

Bill to:

Company:

Personal: Resident House #:

Street: 187 Lakeshore Dr. 187

CSZ: Georgetown KY 40324

☐ Copy Home Address To Job Location (This will overwrite existing Work Address if Blank)

Work Address:

Resident House #:

187 Lakeshore Dr. 187

Georgetown KY 40324

Style #917 – Septic / Portal Toilets

[illegible]

Style #918 – Irrigation

[illegible]

Style #1001 – Heating and Air Conditioning

Alan Rich

Fast Keys

Setup / Other

Documents

✓ Save

✗ Cancel

◀ Previous

1 of 1

Next ▶

Account Notes

Images

Print Acct Info

28 Calendar

Transactions

Invoices

Estimates

Standard Ch

Job Descriptions

Milestones

HVAC Setup

Menu Name / Taxes / Filters

Equipment Info

Filter / Humifier Info

Condenser Info

Test Records

Contact / e-mail / CC Info

General Info

Job Site Info

Menu Name

Alan Rich

Letter

A

Current Balance

0.00

First Name

Resident

Last Name

Resident

☐ Inactive Account
 ☐ Alert
 ☐ Hold Services
 ☐ e-Mail Pymt Recv
 ☐ Print Tot Bal
 ☐ e-mail Appt
 ☐ Print Late Fee

Group

Service Notes

Style #1001

Bill To

Job Location

Company

Personal

Resident

Street

187 Lakeshore Dr.

CSZ

Georgetown

KY

40324

☐ Copy Bill To Address To Job Location (This will overwrite existing Job Location if Blank)

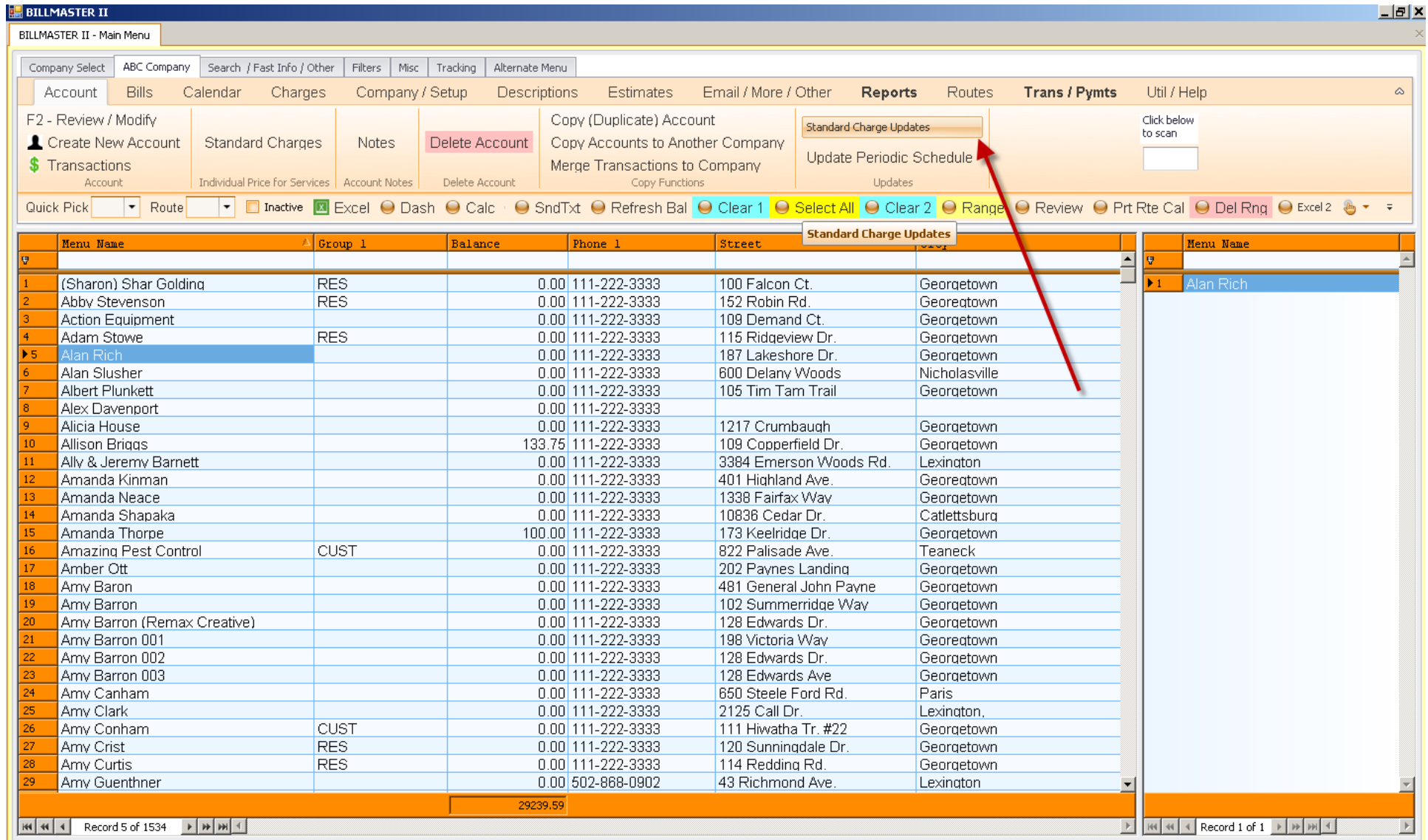
Phone Numbers

HOME	111-222-3333
OFFICE	111-222-3333
FAX	111-222-3333
OTHER	111-222-3333
CELL	111-222-3333

Code	Description	Hours
225	Termite Inspection	

Standard Charges – Adding / Updating

To update the Standard Charges for Multiple Accounts at once, select Standard Charge Update from the Account Menu.



The screenshot displays the BILLMASTER II Main Menu. The 'Account' menu is open, showing various options. The 'Standard Charge Updates' button is highlighted in the 'Updates' section. A red arrow points to this button.

The main menu includes the following sections:

- Company Select:** ABC Company
- Search / Fast Info / Other:** Filters, Misc, Tracking, Alternate Menu
- Account:** F2 - Review / Modify, Create New Account, Transactions
- Bills:** Standard Charges, Individual Price for Services
- Calendar:** Account Notes
- Charges:** Delete Account
- Company / Setup:** Copy (Duplicate) Account, Copy Accounts to Another Company, Merge Transactions to Company
- Descriptions:** Copy Functions
- Estimates:** Standard Charge Updates, Update Periodic Schedule
- Email / More / Other:** Updates
- Reports:** Click below to scan
- Routes:**
- Trans / Pymts:**
- Util / Help:**

The 'Standard Charge Updates' button is located in the 'Updates' section of the 'Estimates' menu.

Menu Name	Group 1	Balance	Phone 1	Street	City
1 (Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2 Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3 Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4 Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5 Alan Rich		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6 Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
7 Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8 Alex Davenport		0.00	111-222-3333		
9 Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10 Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11 Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12 Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13 Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14 Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15 Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16 Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17 Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18 Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19 Amy Barron		0.00	111-222-3333	102 Summeridge Way	Georgetown
20 Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21 Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22 Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23 Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
24 Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
25 Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26 Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27 Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28 Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29 Amy Guenther		0.00	502-868-0902	43 Richmond Ave.	Lexington

Record 5 of 1534

Enter the Job Description Code to set the pricing for. Use the FILL Buttons after selecting rows to fill multiple rows at the same time. This will either Add the Standard Charge to the account or update the existing price. If you enter the price in on a row, press ENTER after making your entry.

Update Standard Charges

Save Job Desc Acct Notes Std Ch Print Grid Scan

Fill Grid Transaction History Help

6 Fill Code Fill Chemical Code Fill Price

Select All Rows Delete Selected Rows Print Grid

Chemical Codes

Fill Buttons

Select ALL Rows if needed before Filling Data

Menu Name	Code	Description	Price	Tax Type	Tax 1			Mix App
Able, Andy	6	Weekly Maintenace	68.00		1			4.0000
Ainsworth, Sally	6	Weekly Maintenace	51.00	800				789.0000
Anderson Ken & Emma	6	Weekly Maintenace	72.00	800	NJ	111	1.0000	40.0000
Andrew, Jackson	6	Weekly Maintenace	80.00	1	NJ			
Andriod, Sam	6	Weekly Maintenace	345.00	800	NJ	112	120.0000	3.0000
Antwar, Carl & Leeann	6	Weekly Maintenace	65.00	800	NJ		0.0000	0.0000
Apple Bakery	6	Weekly Maintenace	45.00	1			0.0000	0.0000
Augusto, Carl & Sue	6	Weekly Maintenace	58.00	800	NJ		0.0000	0.0000
Auguston, Stuart & Donna	6	Weekly Maintenace	79.00	800	NJ		0.0000	0.0000
Babridge Joan	6	Weekly Maintenace	56.00	800	ROC		0.0000	0.0000
Barnstock, Ron & Sue	6	Weekly Maintenace	74.00	800	NJ		0.0000	0.0000

Press ENTER after each entry.

(company ID)

Record 8 of 11


Edit Filter


Account Information - Adding Images and Pictures

To add photos and images linked to an account, select an account to review. Then press the Images Button to add a picture.

Andrew, Jackson

Fast Keys | Setup / Chemical / WDI / Other | Documents

☒ Save
 ☒ Cancel
 Previous 1 of 1
 Next
 Account Notes
  Images

28 Calendar
 Transactions
 Apply Tax to Std Ch
 Standard Ch
  Calls
 Job Descriptions
 History

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info

Menu Name: Andrew, Jackson

Letter: A Customer Code: 4 Group / Type 1: RES

Status: Yellow Group / Type 2:

Current Balance: 398.48 Group / Type 3:

☒ Apply Service Charge if needed?
 ☐ Inactive Account
 ☐ Alert

☒ Charge Taxes?
 ☒ Send Paper
 ☐ Contact

Tax Defaults: NJ
 ☒ Send e-Bill
 ☐ Vendor

☐ Option 1
 ☐ Estimate

☐ No Label/Mailer
 ☐ Bulk

Bill To: Job Location

Bill to:

Company:

Personal: Mr. and Mrs. Andrew Jackson House #:

Street: 4787 Oak Street 4787

CSZ: Mahwah NJ 07430

Standard Charges

Code	Description	Price	Type	T1
7	Monthly Service	150.00	1	NJ
101	Fertilizer Step 1 - Early Sp...	100.00	1	NJ

1

Phone Numbers

Home	241-236-9149	Cell 2	--
Office	222-222-2222	Cell 3	--
Other	--		

Routes

Add to Route Route Notes Delete from Route Change Order

Name

Mowing - Thursday

Select photo from your computer and enter a Category and Description

The screenshot displays the 'Select Image' application window. The title bar reads 'Select Image Andrew, Jackson'. The interface includes a top menu bar with 'Save', 'Select All Rows', and 'Delete Selected Rows'. Below this is a search bar and a table with columns 'Description' and 'Category'. The table contains one row with a house image and the category 'House'. To the right of the table is a form with fields for 'Image File' (C:/bm/logos/house01.JPG), 'Category' (House Front), and 'Description' (Picture of recent project). An 'Add Image' button is located to the right of the 'Description' field. A red arrow points from the 'Add Image' button to the 'Image File' field. Another red arrow points from the 'Add Image' button to the 'Category' field. A third red arrow points from the 'Add Image' button to the 'Description' field. A yellow callout box with the text 'Select your photo or Image' is positioned above the 'Add Image' button. Another yellow callout box with the text 'Enter a Category and Description' is positioned above the 'Category' field. A third yellow callout box with the text 'Then press Add Image' is positioned above the 'Add Image' button. The main area of the application displays a large image of a house. At the bottom of the application window, there is a status bar with a 'Record 1 of 1' indicator and an 'Edit Filter' button.

Transactions

Transaction File – Charging your customer

[VIDEO – Transactions / Invoices](#)

[VIDEO – Fast Invoice](#)

[VIDEO – Invoice Registry](#)

[VIDEO – Find Invoice](#)

Select Transactions for the customer to make a charge to their account. A Transaction File is the complete history of an account. It contains **ALL** charges and payments to the account. You must enter a charge here in order to produce a bill.

1. Balance for the account
2. Print a Bill for the account
3. The description can be as long as you want for your bills.
4. Change the date for all rows selected
5. The Sub total and tax and balance are shown for each line

Job Loc: Andy Able 68 New County Road Monsey NY 10952

Fast Keys | Functions / Settings | Grid Configuration | Job Locations

1 of 1

Able, Andy Home 745-348-4888

Balance **160.50** Charge Taxes: YES NJ

Routes
Customers - A'ddl Leaves john

Drag a column header to group by that column

Transaction										Totals			Check No	Invoice No	Taxes Cha...	Date		
Code	Description	Qty	Price	Date	Δ	Type	Sub Tot	Bal	Open	Chk No	Inv No	Tax 1	Tax	Month	Day	Year		
7	Monthly Service	1.0000	150.00	05/30/2009		1	160.50	160.50	0.00	0		0	NJ	5	30	2009		
3	Payment - Thank You Check	1.0000	-160.50	06/10/2009		3	-160.50	0.00	0.00	5682		0	NJ	6	10	2009		
7	Monthly Service	1.0000	150.00	06/30/2009		1	160.50	160.50	0.00	0		0	NJ	6	30	2009		
3	Payment - Thank You	1.0000	-160.50	07/30/2009		3	-160.50	0.00	0.00	0		0	NJ	7	30	2009		
7	Monthly Service	1.0000	150.00	12/30/2009		1	160.50	160.50	160.50	0		0	NJ	12	30	2009		
*																		

Annotations in the image:

- 1. Points to the "Balance" field showing 160.50.
- 2. Points to the "Print Bill" button.
- 3. Points to the "Description" column header.
- 4. Points to the "Date" column header.
- 5. Points to the "Sub Tot" and "Bal" columns.

How to Enter A Charge

Step 1: Enter a Job Description / Inventory Code.

The Description you created for that code will automatically appear in the description column.

Today's date will automatically appear in the date column. You may change the date if necessary.

Step 2: Enter the quantity if needed, otherwise a quantity of ONE is the default

Step 3: Enter the price if necessary.

The price for this under the Account Information screen - Standard Codes and Charges.

When you enter the code it will automatically put in this account's price, other the price for the Job Description will be used.

How to enter a payment:

Step 1: Enter Code 3 and press ENTER. A new dialog will appear.

Then enter the check amount and the date.

Enter the check number (of leave blank if you don't have a check number) and press ENTER.

Transaction File – Delete Row(s)

VIDEO – Delete Transactions

To delete a row or rows from the transaction file. Select the row by pressing on the far LEFT Margin of the grid and hold down the mouse button. Then the press the Delete Selected Row(s) button.

If the row you are trying to delete is the last row, it may not be part of the file yet, so it can be deleted. You can either Save and Refresh and then delete it or overwrite the row.

Job Loc: Andy Able 68 New County Road Monsey NY 10952

Fast Keys | Functions / Settings | Grid Configuration | Job Locations

1 of 1
User 1 - superuser

Able, Andy Home 745-348-4888

Balance 160.50 Charge Taxes: YES NJ

Routes
Customers - Addl Leaves John

Drag a column header here to group by that column

Transaction										Totals		Check No	Invoice No	Taxes Cha...	Date
Code	Description	Qty	Price	Date	Type	Sub Tot	Bal	Open	Chk No	Inv No	Tax 1	Tax	Month	Day	Year
7	Monthly Service	1.0000	150.00	05/30/2009	1	160.50	160.50	0.00	0	0	NJ	10.50	5	30	2009
3	Payment - Thank You Check No.5682	1.0000	-160.50	06/10/2009	3	-160.50	0.00	0.00	5682	0	NJ	10.50	6	10	2009
7	Monthly Service	1.0000	150.00	06/30/2009	1	160.50	160.50	0.00	0	0	NJ	10.50	6	30	2009
3	Payment - Thank You	1.0000	-160.50	07/30/2009	3	-160.50	0.00	0.00	0	0	NJ	10.50	7	30	2009
7	Monthly Service	1.0000	150.00	12/30/2009	1	160.50	160.50	160.50	0	0	NJ	10.50	12	30	2009
*															

1 2

Record 5 of 5

Customized Business Software, LLC. © 1999-2010 All Rights Reserved.

Transaction File – Yearly Activity Display and Grid Size

Job Loc: Mrs. Joan Abridge 224 Sparrowbush Rd Mahwah NJ 07430

Fast Keys | Functions / Settings | Grid Configuration

Account Notes | Edit Docs | **Calls** | Add Trans | Change Job Loc | Fill Tax Code 1

Transact Config | Fill Date | Sales Tax Setup | Tutorial

Yearly Activity - Charges/Pymts (All without Tax)

2006	0.00	0.00
2007	0.00	0.00
2008	0.00	0.00
2009	2652.00	0.00

Transaction Settings

OK Exit

- ☒ A - Automatically update Balance after Tabbing from Date Field
- ☒ B - Automatically update Balance after Make Charges
- ☒ C - Zero tax amounts between -0.05 and 0.05
- ☒ D - Treat all quantities of Zero as 1.0
- ☐ E - Allow deletion of all Transaction records
- ☒ F - Allow deletion of some Transaction records
- ☒ G - Prevent Inactive Accounts from being charged
- ☐ H - Prevent Yellow Status Accounts from being charged
- ☐ I - Prevent Red Status Accounts from being charged
- ☒ J - Display Yearly Activity in Transaction File Screen

Color For Transaction Types

3, 380 - Payment / Deposit	BLUE
4 - Credit	RED
5 - Service Charge	MAGENTA
800 - Non Tax Item	GREEN
900 - 910 Hidden	ORANGE

Drag a column header here to group by that column

Transaction	Code	Description	Qty	Unit	Price	Amount	Chk No	Inv
12		Core Aeration						
1		test						
6		Weekly Maintenance - Mow & T						
8		Spring Clean-Up						
12		Core Aeration						
12		Core Aeration						
12		Core Aeration						
6		Weekly Maintenance - Mow & T						
12		Core Aeration						
10		Monthly Weeding						
9		Fall Clean-Up	1.0000	100.00	10/18/2009	1	108.38	
12		Core Aeration	1.0000	136.00	10/18/2009	700	147.40	

Record 19 of 19

To Display the yearly activity in the transaction, screen. Go to the Transaction Configuration and check option J.

The next time you open the transaction file, the last 4 year of activity is shown on the Functions / Settings tab.

Note Payment totals are shown as Negative amounts.

JOB DESCRIPTIONS

Job Descriptions – Modify

Select Descriptions modify from the Main Menu to modify Job Descriptions.

Job Descriptions is a list of descriptions of services and or items that you provide for your customers. Each account can have a different price for any Job Description. The Job Description File(s) is a database for common job descriptions and items. Using a code is a quick way of typing.

When you enter a code, the description and pricing automatically appears.

Standard Job Description File:

BILLMASTER creates the first Job Descriptions file for you. This file contains common Job Description codes for Payments, Credits, Service Charges, Standard Work Descriptions, etc. You may add and change codes and descriptions in this file.

Job Descriptions

Fast Keys | Other | Grid Configuration | Job Description Defaults

Standard | Lawn Maintenance | Fertilization | Pest Control

Drag a column header here to group by that column Double click row to insert into transaction file

Category	Code	Description	jobDescShort	Price	Tax T...	Tax Cd1	Tax Cd2	Tax Cd4	Tax Cd3	Hourly
	3	Payment - Thank You	PYMT	0.00	3					0
	4	Credit	CREDIT	0.00	4					0
	5	Service Charge	SERV CHAR	0.00	5					0
	6	Weekly Maintenance Charge	WK MAINT	0.00	1					0
	7	Monthly Maintenance Charge	MON MAINT	0.00	1					0
	101	Fertilizer Step 1 - Early Spring	Step 1	0.00	1					0.00
	102	Fertilizer Step 2 - Late Spring	Step 2	0.00	1					0.00
	103	Fertilizer Step 3 - Summer	Step 3	0.00	1					0.00
	104	Fertilizer Step 4 - Early Fall	Step 4	0.00	1					0.00
	105	Fertilizer Step 5 - Late Fall	Step 5	0.00	1					0.00
	106	Fertilizer Step 6 - Winterize	Step 6	0.00	1					0.00
	150	Soil Test	SoilT	0.00	1					0.00
	151	Seeding	Grub							0.00
	152	Lime	Lime							0.00
	153	Grub Control	Grub							0.00
	154	Insect Control	Insect							0.00
	155	Tick Control	Tick							0.00
	156	Fire Ant Control	FireAnt							0.00
	157	Dallis Grass Control	DGC							0.00

Code is a number

Description can be for any service or material you need.

Leave price at zero, if you will have a individual price for each account. BILLMASTER will use the account Standard Charge price first. If no price is found in the Standard Charge, then the Job Description price will be used.

Tax code for item.

Tax Type
1 = Taxed Item
3 = Payment
4 = Credit
5 = Service Charge

Default job descriptions are provided. Press the corresponding button to load those job descriptions.

The fertilization job description is shown.

You can also import thousands of job descriptions from the Import feature of BILLMASTER.

Job Descriptions – Column Definitions

Code

Is the number you assign to a description.

Description

This describes the item or job.

Type

A code Type is a number that instructs BILLMASTER how to treat the item when totaling the Account Transaction File and printing bills. The Type is usually number 1.

1	Standard Type - Taxes will be charged to the item if needed.
3	Payments. You can use your own wording for payment description. BILLMASTER will always total accounts using 3 as the payment code. When entering payments for your accounts, be sure to enter the exact amount paid to you including tax. When saved the payment will automatically be subtracted from the balance.
380	Payments for charges without Tax included in the charge, within a Account that charges tax.
4	Credit - Record any credits given. You can use your own wording for credit description. Do not include tax for the amount. BILLMASTER will return the tax automatically.
5	Service charge (Finance charge). You can use your own wording for the service charge description. BILLMASTER will automatically apply service charges during the Produce Bills process. We suggest letting BILLMASTER handle this automatically. Remember to set the setting in the Account's Information file at the bottom of the screen and line F and G in the Produce Bills screen.
700	No date or price is printed on a bill for charges using this TYPE. Description only to be printed on the bill.
800	<u>Non-tax codes</u> These codes are used if you have an account that is taxed, but you have certain charges that are not taxed, such as Capital Improvements.
900 -910	Hidden Transaction - Transaction is note to you in the file. It will not affect the total of the file.

Charges

Make Charges – Single Charge Per Account

When you enter a charge it goes directly into each customer's transaction file. It is stored and stored by the date used.

Reminder: You must have charges to produce a bill.

Select Accounts for Charges and/or Payments

Transactions may be entered into the accounts in one of two ways:

1. Charges Can be entered directly from Main Menu , Transactions, or
2. Charges, Single Charge, Multiple, Calendar

The Make Charges function is designed to make entries into MANY accounts as quickly as possible.

Begin by selecting your accounts.

Accounts may be selected as often as necessary, if more than one job was done for them.

Step 1 - Select your accounts. (You may use the routes you have created to make the process faster). Then select Charges.

The screenshot shows the BILLMASTER II - Main Menu interface. The 'Charges' menu is selected, and the 'Single Charge Per Account' option is chosen. A list of accounts is displayed with columns for Menu Name, Group 1, Balance, Phone 1, Street, and City. The account 'Alan Rich' is highlighted. The status bar at the bottom shows 'Record 5 of 1534' and a total balance of '29239.59'.

Menu Name	Group 1	Balance	Phone 1	Street	City
1 (Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2 Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3 Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4 Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5 Alan Rich		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6 Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
7 Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8 Alex Davenport		0.00	111-222-3333		
9 Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10 Allison Briggs		133.75	111-222-3333	109 Cooperfield Dr.	Georgetown
11 Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12 Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13 Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14 Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15 Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16 Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17 Amber Ott		0.00	111-222-3333	202 Pavnes Landing	Georgetown
18 Amy Barron		0.00	111-222-3333	481 General John Payne	Georgetown
19 Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
20 Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21 Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22 Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23 Amy Barron 003		0.00	111-222-3333	128 Edwards Ave.	Georgetown
24 Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
25 Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26 Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27 Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28 Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29 Amy Guenther		0.00	502-888-0902	43 Richmond Ave.	Lexington

Make Charges – Single Charge per Account

After selecting accounts, the accounts are shown as below. You can enter the code for the charge you want to apply. You can also enter in a code and or date to fill for the rows you have selected. After selecting accounts it will put the price in if the account has the standard charge entered.

There are preset codes for Payment – Code 3, Credit - Code 4 and Service Charge – Code 5. For payments - Enter the amount paid. For example \$50.25 **YOU DO NOT HAVE TO ENTER THE AMOUNT AS A NEGATIVE NUMBER.** The program will automatically save it as a negative number.

Credit – Code 4 - When inputting a Credit, the program considers NO TAX is included when entered. Even if the account is taxed, enter the Credit of the base amount. Tax will be added as necessary. DO NOT input a credit as a negative number. The program will automatically enter it as a negative number.

Service Charge – Code 5 – On the customer's account information screen you can choose whether or not you want the that individual to have a Service Charge (late fee). Set the service charge function to YES when producing bills to automatically apply service charges to accounts if necessary. The program will do the calculations for you.

Make Charges

Save Job Desc Acct Notes Std Ch Print Grid Scan

Fill Grid Transaction History Help

6 Fill Code
Fill Qty
12/30/2009 Fill Date

Select All Rows
Delete Selected Rows
Print Grid
Refresh Completed Count

Change multiple rows with the FILL Buttons

Menu Name	Balance	Code	Qty	Price	Date	Tax Type	Completed
Ainsworth, Sally	227.04	6	1.0000	51.00	12/30/2009	800	22
Anderson Ken & Emma	408.84	6	1.0000	72.00	12/30/2009	800	9
Andriod, Sam	56.05	6	1.0000	345.00	12/30/2009	800	5
Babridge Joan	0.01	6	1.0000	56.00	12/30/2009	800	6
Barnstock, Ron & Sue	2712.45	6	1.0000	74.00	12/30/2009	800	4
Baron, Alan & Sue	0.19	6	1.0000	69.00	12/30/2009	800	4
Bear, Mr & Mrs	49.68	6	1.0000	52.00	12/30/2009	800	4
Becker, Alan & Irene	0.00	6	1.0000	0.00	12/30/2009	1	0
Bendian, Ron & Sue	5385.23	6	1.0000	53.00	12/30/2009	800	3
Berger George & Sarah	3231.94	6	1.0000	55.00	12/30/2009	800	2
Bigwig, Leon	69.57	6	1.0000	65.00	12/30/2009	800	11
Boldman Sam & Sally	2606.66	6	1.0000	51.00	12/30/2009	800	2

When the code is entered the description for that code will appear. The price set up for that customer will also appear. Today's date is used, but you can over ride the date by selecting row and enter the new date in FILL date

Price retried for each

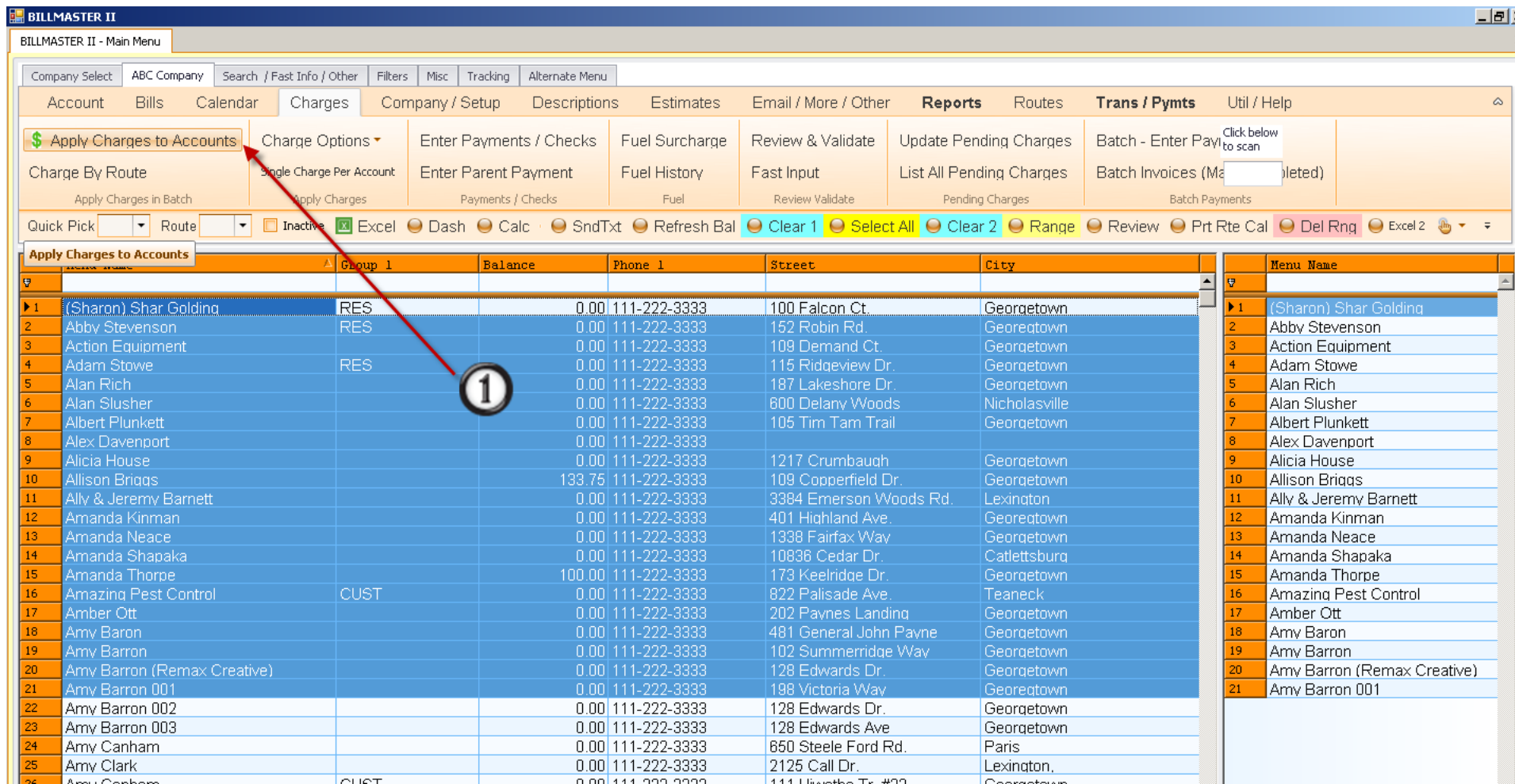
(company ID) Edit Filter

Record 12 of 12

Make Charges – Multiple Charges per Account

[VIDEO – Applying Charges to Accounts](#)

You can also apply charges to accounts by entering a series of Job Description codes and having those codes be applied to the account selected. Begin by selecting your accounts. As always you can select account using the mouse, or selecting a route, or press the ALL button.



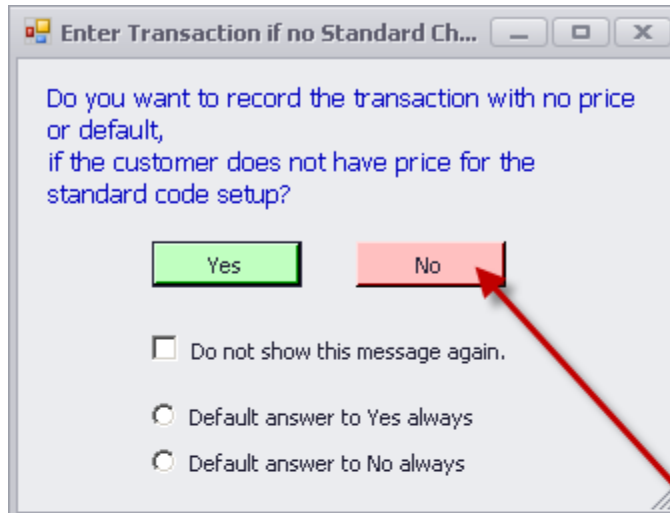
The screenshot shows the BILLMASTER II Main Menu. The 'Charges' tab is selected. The 'Apply Charges to Accounts' button is highlighted with a red arrow. Below the menu, a list of accounts is displayed. The first account, (Sharon) Shar Golding, is highlighted with a circled '1'.

Menu	Name	Group	Balance	Phone	Street	City
1	(Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2	Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3	Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4	Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5	Alan Rich		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6	Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
7	Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8	Alex Davenport		0.00	111-222-3333		
9	Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10	Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11	Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12	Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13	Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14	Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15	Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16	Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17	Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18	Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19	Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
20	Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21	Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22	Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23	Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
24	Amy Canham		0.00	111-222-3333	850 Steele Ford Rd.	Paris
25	Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26	Amy Canham	CUST	0.00	111-222-3333	1111 Liberty Tr. #32	Georgetown

Enter your codes to make charges for.

[illegible]

After entering your codes you will be asked whether or not you want to list the account if there is no standard charge associated with the charge for that account for that code. Answer NO and only accounts that have a price set up will be listed.



**If you only want to
have customers
that have a price
for the codes you
entered come up
then**

Select NO

Make Charges – For multiple weeks

If you want to apply charges for a service, such as weekly mowing, you can apply all the charges for the month to your Accounts at one time. Select your accounts, Choose Charge for Multiple Weeks under the Charges menu. Enter in the code and the dates for those services to be applied.

[illegible]

Make Charges

Save

Job Desc

Acct Notes

Std Ch

Print Grid

Scan

Fill Grid

Transaction History

Help

↓

Fill Code

↓

Fill Qty

12/30/2009

↓

Fill Date

Select All Rows

Delete Selected Rows

Print Grid

Refresh Completed Count

Menu Name	Balance	Code	Description	Qty	Price	Date	Tax Type	Completed
▶ Able, Andy	303.84	6	Weekly Maintenance	1.0000	0.00	06/05/2009		1
Able, Andy	303.84	6	Weekly Maintenance	1.0000	0.00	06/12/2009		1
Able, Andy	303.84	6	Weekly Maintenance	1.0000	0.00	06/19/2009		1
Able, Andy	303.84	6	Weekly Maintenance	1.0000	0.00	06/26/2009		1
Ainsworth, Sally	1527.04	6	Weekly Maintenance	1.0000	51.00	06/05/2009		800
Ainsworth, Sally	1527.04	6	Weekly Maintenance	1.0000	51.00	06/12/2009		800
Ainsworth, Sally	1527.04	6	Weekly Maintenance	1.0000	51.00	06/19/2009		800
Ainsworth, Sally	1527.04	6	Weekly Maintenance	1.0000	51.00	06/26/2009		800
Anderson Ken & Emma	1761.10	6	Weekly Maintenance	1.0000	72.00	06/05/2009		800
Anderson Ken & Emma	1761.10	6	Weekly Maintenance	1.0000	72.00	06/12/2009		800
Anderson Ken & Emma	1761.10	6	Weekly Maintenance	1.0000	72.00	06/19/2009		800
Anderson Ken & Emma	1761.10	6	Weekly Maintenance	1.0000	72.00	06/26/2009		800
Andriod, Sam	56.05	6	Weekly Maintenance	1.0000	345.00	06/05/2009		800
Andriod, Sam	56.05	6	Weekly Maintenance	1.0000	345.00	06/12/2009		800
Andriod, Sam	56.05	6	Weekly Maintenance	1.0000	345.00	06/19/2009		800
Andriod, Sam	56.05	6	Weekly Maintenance	1.0000	345.00	06/26/2009		800
Babridge Joan	0.01	6	Weekly Maintenance	1.0000	56.00	06/05/2009		800
Babridge Joan	0.01	6	W	1.0000	56.00	06/12/2009		800
Babridge Joan	0.01	6	W	1.0000	56.00	06/19/2009		800
Babridge Joan	0.01	6	W	1.0000	56.00	06/26/2009		800
Barnstock, Ron & Sue	2712.45	6	W	1.0000	74.00	06/05/2009		800
Barnstock, Ron & Sue	2712.45	6	W	1.0000	74.00	06/12/2009		800
Barnstock, Ron & Sue	2712.45	6	W	1.0000	74.00	06/19/2009		800
Barnstock, Ron & Sue	2712.45	6	W	1.0000	74.00	06/26/2009		800
Baron, Alan & Sue	0.19	6	Weekly Maintenance	1.0000	69.00	06/05/2009		800

(company ID)

Edit Filter

Record 1 of 44

The charges are applied for each account as needed for the dates entered

Make Charges – Charge by Route

Allows for quick selection of a route and then a preview to remove account from the list before proceeding forward with the charges.

Double Click to Select Item

OK Cancel Create / Rename

Name
01 Mon
02 Tue
03 Wed
04 Thu
05 Fri
06 Sat
07 Sun

Select Route to Charge

Menu Name | **Group 1** | **Balance**

1	(Sharon) Shar Golding	RES	
2	Abby Stevenson	RES	
3	Action Equipment		
4	Adam Stowe	RES	
5	Alan Rich		
6	Alan Slusher		
7	Albert Plunkett		
8	Alex Davenport		
9	Alicia House		
10	Allison Briggs		
11	Ally & Jeremy Barnett		
12	Amanda Kinman		
13	Amanda Neace		
14	Amanda Shapaka		
15	Amanda Thorpe		
16	Amazing Pest Control	CUST	
17	Amber Ott		
18	Amy Baron		
19	Amy Barron		
20	Amy Barron (Remax Creative)		
21	Amy Barron 001		
22	Amy Barron 002		
23	Amy Barron 003		
24	Amy Canham		
25	Amy Clark		
26	Amy Conham	CUST	
27	Amy Crist	RES	
28	Amy Curtis	RES	
29	Amy Guenther		

Record 4 of 1534 29239.59

Record 0 of 0

Remove account from the list by selecting the row and press Delete Selected Rows as needed.

Make Charges

Save Job Desc Acct Notes Std Ch Print Grid Scan

Fill Grid Transaction History Help

Fill Code Fill Qty Fill Date

Select All Rows Delete Selected Rows Print Grid Refresh Completed Count

Menu Name	Balance	Code	Description	Qty	Price	Date	Tax Type	Completed
Cinco Lou & Janet	3979.68	10		1.0000	0.00	12/30/2009	0	1
Gilmour Glenn & Ellen	8406.69	10		1.0000	0.00	12/30/2009	0	2
Gilmour Glenn & Ellen	8406.69	11		1.0000	0.00	12/30/2009	0	4
Harahan, Mark & Kathy	82.98	10		1.0000	0.00	12/30/2009	0	3
Harahan, Mark & Kathy	82.98	11		1.0000	0.00	12/30/2009	0	0
Harahan, Mark & Kathy	82.98	12		1.0000	0.00	12/30/2009	0	2
Hochman Mike & Faith	2835.91	10		1.0000	0.00	12/30/2009	0	4
Hochman Mike & Faith	2835.91	22		1.0000	0.00	12/30/2009	0	0
Hochman Mike & Faith	2835.91	33		1.0000	0.00	12/30/2009	0	0
Juran Marina	2983.46	10		1.0000	0.00	12/30/2009	0	0
Baron, Alan & Sue	0.19	10		1.0000	0.00	12/30/2009	0	2
Bossner, Jim & Michelle	244.98			1.0000	0.00	12/30/2009	0	
Bigwig, Leon	69.57	10		1.0000	0.00	12/30/2009	0	1
Monteith, Rick & Donna	5243.94	10		1.0000	0.00	12/30/2009	0	2
Bear, Mr & Mrs	49.68	10		1.0000	0.00	12/30/2009	0	5
Bresner Joe & Anne	131.61	10		1.0000	0.00	12/30/2009	0	0
Happy Hank	337.05	10		1.0000	0.00	12/30/2009	0	1
Babridge Joan	0.01			1.0000	0.00	12/30/2009	0	
Able, Andy	303.84			1.0000	0.00	12/30/2009	0	

Remove accounts from the list by selected rows and press Delete Selected Rows

Record 5 of 19 Edit Filter

Enter Payments / Checks

VIDEO – Enter Single Payment

To enter payments from customers, first select the customers who have paid you. You can scan the bar code on the invoice receipt and the customer will be retrieved automatically.

BILLMASTER II

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | Descriptions | Estimates | Email / More / Other | **Reports** | Routes | **Trans / Pymts** | Util / Help

Transactions | **F11 - Fast Invoice** | **Enter Checks / Payments** | Invoice Registry | **Credit Card Payment** | Delete Transactions | Print Deposit Slips

Transactions by Inv No. with text | **Find Invoice** | Batch Payments | Payments / Checks | Delete Transactions | Print Payments

Quick Pick: [] | Route: [] | Inactive [] | Excel [X] | Dash [] | Calc [] | SndTx [] | Refresh Bal [] | Clear 1 [] | Select All [] | Clear 2 [] | Range [] | Review [] | Prt Rte Cal [] | Del Rng [] | Excel 2 []

Menu Name	Group 1	Balance	Phone 1	Street	City
1 (Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2 Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3 Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4 Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5 Alan Rich		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6 Alan Slusher		0.00	111-222-3333	800 Delany Woods	Nicholasville
7 Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8 Alex Davenport		0.00	111-222-3333		
9 Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10 Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11 Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerald Woods Rd.	Lexington
12 Amanda Kinman		0.00	111-222-3333	401 High	Georgetown
13 Amanda Neace		0.00	111-222-3333	1338 Fair	Georgetown
14 Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15 Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16 Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17 Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18 Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19 Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
20 Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21 Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22 Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23 Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
24 Amy Canham		0.00	111-222-3333	650 Steele Ford Rd.	Paris
25 Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington
26 Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27 Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28 Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29 Amy Guenther		0.00	502-868-0902	43 Richmond Ave.	Lexington

Record 14 of 1534

29239.59

Menu Name
1 Alan Slusher
2 Alicia House
3 Amanda Kinman
4 Amanda Neace
5 Amanda Shapaka

Record 1 of 5

Batch Payments

[VIDEO – Enter Batch Payments](#)

Enter Payment

If you don't have a Check Number, leave the field blank.

☐ Search Pending Invoices also

☐ Mark corresponding transactions for invoice as completed

	Invoice No.	Cust No.	Customer	Open	Balance	Check number (Last 5 digits only)	Payment Amount	Payment Description	Date received
1.		2250	Allison Briggs	133.75	133.75		133.75	Payment - Thank You	04/01/2015
2.								Payment - Thank You	04/01/2015
3.								Payment - Thank You	04/01/2015
4.								Payment - Thank You	04/01/2015
5.								Payment - Thank You	04/01/2015
6.								Payment - Thank You	04/01/2015
7.								Payment - Thank You	04/01/2015
8.								Payment - Thank You	04/01/2015
9.								Payment - Thank You	04/01/2015
10.								Payment - Thank You	04/01/2015

Then enter in the payment amount, Check No. (If available) and Invoice No. (If available)

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | Descriptions | Estimates | Email / More / Other | **Reports** | Routes | **Trans / Pymts** | Util / Help

Transactions | **F11 - Fast Invoice** | Customer: Allison Briggs | Balance: 133.75

Transactions by Inv No. with text | Invoice Registry | Find Invoice | Invoices

Quick Pick | Route | Inactive | Excel

Menu Name	Group 1
1 (Sharon) Shar Golding	RES
2 Abby Stevenson	RES
3 Action Equipment	
4 Adam Stowe	RES
5 Alan Rich	
6 Alan Slusher	
7 Albert Plunkett	
8 Alex Davenport	
9 Alicia House	
10 Allison Briggs	
11 Ally & Jeremy Barnett	
12 Amanda Kinman	
13 Amanda Neace	
14 Amanda Shapaka	
15 Amanda Thorpe	
16 Amazing Pest Control	CUST
17 Amber Ott	
18 Amy Baron	
19 Amy Barron	
20 Amy Barron (Remax Creative)	
21 Amy Barron 001	
22 Amy Barron 002	
23 Amy Barron 003	
24 Amy Canham	
25 Amy Clark	
26 Amy Conham	CUST
27 Amy Crist	RES
28 Amy Curtis	RES
29 Amy Guentner	

Bill To: Resident, 109 Copperfield Dr., Georgetown KY 40324

Job Location: Resident, 109 Copperfield Dr., Georgetown KY 40324

Enter Amount: Payment Amount: 133.75

Date: Date received: 04/01/2015

Enter Check and Invoice No.

Check number (Last 5 digits only): 23424

If you don't have a Check Number, leave the field blank.

Payment Description: Payment - Thank You Check No.23424

Invoice No.: 20480 | Invoice Amount: 133.75 | Enter the invoice number that is being paid, or leave blank if unknown.

19166
20480

OK

Menu Name
1 Allison Briggs

Record 10 of 1534 | 29239.59 | Record 1 of 1

Produce Bills

[VIDEO - Produce Bills / Invoices](#)

[VIDEO – Adjusting the print for a Invoice](#)

Selected accounts to bill. After printing bills you can store a list of the bills that were printed. This is called a Bill Listing. The standard functions are available to you to review, print, rename and delete the Bill Listing file.

The default settings for this screen can be changed. See Configuration.

A-D

To produce invoices, select this section. The program will ask to input the starting and ending dates of the billing period.

A – Start and Ending Dates

These dates are important. All transactions that have occurred within this date period will be shown on the bill. NOTE - All transactions that occur before the starting date are considered the Previous Balance.

C - Date appearing on Bill

This date is totally independent of the starting and ending dates. It is the date that appears on the bill. Next enter the

D – Due Date

Due Date to appear on the bill if desired.

Note: The Due Date does not print on all bill form types.

The screenshot shows the 'Produce Bills' window with the following elements:

- Buttons:** OK, Exit, Billing Settings, Service Charge Settings, Bill Print Settings, E-Mail Configuration, Watermark Settings, Company Name & Addr, Coupons.
- Tabs:** Standard Settings, Additional Settings.
- Customers Selected:** 1
- Processing Status:** (empty field)
- Billing Dates:**
 - A - Start of Billing Period: 04/01/2015
 - B - End of Billing Period: 04/30/2015
 - C - Date Appearing on Bill: 04/01/2015
 - D - Due Date: 04-22-2015
- Bill List Title:** 04/01/2015
- E - Print bills with a balance due of \$ X.XX or more:** -9999
- Print bills with a zero balance?:** ☒ (Note: change this option to -9999 for accounts with credits or zero)
- 8.5 x 11.0 - Job Loc on Bottom, 4" bottom tear off ss Truck to Pick Style**
- F - Invoice Form No. to Print:** 4
- G - Next Invoice Number to Print:** 21752
- Custom Print Style will print if filled in below:** C:/bm/custom/billstyle_0004.rep
- Run Report Designer when OK is pressed:** ☐
- H - Use Job Location if address is different. No will always print advertisement:** ☒
- I - Print as statement? No will always print without PAYMENTS and PREVIOUS BALANCE:** ☒ **Print Previous Balance SUMMARY on Statements**
- J - Apply Service Charge if necessary (see Service Charge Settings):** ☐
- L - Advertisement Text:** To ensure proper credit please include this portion of invoice with payment. Like us on Facebook. Check out our website gatewaypestctrl.com
- Override Invoice No.:** (empty field)
- Print Invoice No. Column:** ☐
- Print Aging on Statement:** ☐
- Print Open Invoice Listing if Previous Balance greater than Zero on Statements:** ☐
- Overwrite default message:** ☐
- Use alternative print style:** ☐

Produce Bills – Print options

E - Only print bills with a balance of : 1.00: or GREATER. To print invoices for accounts with a balance of ZERO or less, enter -9999.00 for this number. This will print all invoices that have a balance GREATER than -9999.00. **For Pre-Paid Accounts enter -99999.00 to produce a bill.**

F- G

Next, is a series of questions that already have default values. First is whether to apply a service (finance) charge if necessary. If Yes is answered, then for all accounts selected to be billed that have a previous balance greater than 3.00 (you can change this value), will have a service charge applied. That charge will be listed on the bill. Only one service charge will be applied for each month. The system will not apply two charges in one month, even if the bill is reprinted several times.

H

The Job Location will print in the advertisement area if it is different that the Bill To address, unless you select NO. Refer to the Configuration section for billing settings.

I

Print as a statment. Printing a bill as a statement shows previous balance information. Enter N to print an invoice with only the transactions for the period selected and the charges due for that period. No Payments, Credits or Previous Balance will be shown.

J

An advertisement or announcement for the month can be entered in the fields provided.

Produce Bills – Print by Invoice No.

[VIDEO – Printing a Invoice](#)

To print or reprint a bill by invoice number. You can simply enter the Invoice number to reprint on the produce bills screen.

Produce Bills

Standard Settings | Additional Settings

Customers Selected
 Processing Status

☐ Only print invoices that have not been printed.

Billing Dates:

 A - Start of Billing Period

 B - End of Billing Period

 C - Date Appearing on Bill

 D - Due Date

Bill List Title

 E - Print bills with a balance due of \$ X.XX or more

 8.5 x 11.0 - Job Loc on Bottom, 4" bottom tear off ss Truck to Pick Style

☒ Print bills with a zero balance?

Note: change this option to -9999 for accounts with credits or zero

F - Invoice Form No. to Print

 G - Next Invoice Numer to Print

Invoice Print Text

☐ Run Report Designer when OK is pressed.

☒ H - Use Job Location if address is different. No will always print advertisement.

☐ I - Print as statement? No will always print without PAYMENTS and PREVIOUS BALANCE

☐ J - Apply Service Charge if necessary (see Service Charge Settings)

L - Advertisement Text

☐ Overwrite default message

Custom Print Style will print if filled in below.

☐ Use alternative print style

☐ Print Invoice No. Column

☐ Print Payments if printing a Invoice

Override Invoice No.

To ensure proper credit please include this portion of invoice with payment.

Like us on Facebook.

Check out our website gatewaypestctrl.com


Bill / Invoice Samples

Select the Bill / Invoice style, The colors and watermarks for each style can be set from the Bill Print and Watermark Settings on the Produce Bill Screen

Style # 1


ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444	10033 01/04/2010 *****FLOWERING PLANT SPECIAL***** HALF PRICE SALE ON ROSES & HYDRANGEAS REMEMBER TO WATER!
Andy Able 68 New County Road Monsey NY 10952	<div style="background-color: yellow; padding: 10px; border: 1px solid black; display: inline-block;"> Style # 1 </div>

>
<



DATE	DESCRIPTION	AMOUNT	TOTALS
01/04/10	Monthly Service	150.00	150.00
Sub Total			150.00
Total Charges			150.00
Previous Balance			105.84
Payments and Credits			0.00
Balance Due			255.84

PLEASE RETURN TEAR OFF WITH PAYMENT




Style # 2

ABC Company	
126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444	

	<table border="1"> <tr> <th>Inv No.</th> <th>Acct No.</th> <th>Billing Period</th> <th>DUE DATE</th> </tr> <tr> <td>10033</td> <td>3113</td> <td>01/01/2010 01/31/2010</td> <td>01/04/2010</td> </tr> </table>	Inv No.	Acct No.	Billing Period	DUE DATE	10033	3113	01/01/2010 01/31/2010	01/04/2010
Inv No.	Acct No.	Billing Period	DUE DATE						
10033	3113	01/01/2010 01/31/2010	01/04/2010						

Andy Able 68 New County Road Monsey NY 10952 -----	<table border="1"> <tr> <td colspan="2">ACCOUNT SUMMARY as of 01/04/2010</td> </tr> <tr> <td>Previous Balance</td> <td>105.84</td> </tr> <tr> <td>Payments</td> <td>0.00</td> </tr> <tr> <td>Current Charges</td> <td>150.00</td> </tr> <tr> <td>Taxes</td> <td>0.00</td> </tr> <tr> <td>Sub Total</td> <td>150.00</td> </tr> <tr> <td>TOTAL AMOUNT DUE</td> <td>255.84</td> </tr> </table>	ACCOUNT SUMMARY as of 01/04/2010		Previous Balance	105.84	Payments	0.00	Current Charges	150.00	Taxes	0.00	Sub Total	150.00	TOTAL AMOUNT DUE	255.84
ACCOUNT SUMMARY as of 01/04/2010															
Previous Balance	105.84														
Payments	0.00														
Current Charges	150.00														
Taxes	0.00														
Sub Total	150.00														
TOTAL AMOUNT DUE	255.84														



Job Location	
Andy Able , 68 New County Road , Monsey NY 10952	


DATE	DESCRIPTION	AMOUNT
01/04/10	Monthly Service	150.00

Style #2

Please detach and return bottom portion with payment. Retain the top portion for your records

PLEASE RETURN TEAR OFF WITH PAYMENT

Andy Able 68 New County Road Monsey NY 10952 *****FLOWERING PLANT SPECIAL***** HALF PRICE SALE ON ROSES & HYDRANGEAS REMEMBER TO WATER!	ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444 <table border="1"> <tr> <td>Invoice Number</td> <td>10033</td> </tr> <tr> <td>DUE DATE</td> <td>01/04/2010</td> </tr> <tr> <td>AMOUNT DUE</td> <td>255.84</td> </tr> <tr> <td>Payment</td> <td></td> </tr> <tr> <td>Check Number</td> <td></td> </tr> </table> Please Make Check Payable to: ABC Company	Invoice Number	10033	DUE DATE	01/04/2010	AMOUNT DUE	255.84	Payment		Check Number	
Invoice Number	10033										
DUE DATE	01/04/2010										
AMOUNT DUE	255.84										
Payment											
Check Number											



Style # 3

		01/04/2010 10033
		****FLOWERING PLANT SPECIAL**** HALF PRICE SALE ON ROSES & HYDRANGEAS REMEMBER TO WATER!
<p>Andy Able 68 New County Road Monsey NY 10952</p>		
01/04/10	Monthly Service	150.00
Sub Total		150.00
NYC Sales Tax		0.00
Total		150.00
Previous Balance		105.84
Payments and Credits		0.00
PLEASE RETURN TEAR OFF WITH PAYMENT		255.84
<p>Andy Able 68 New County Road Monsey NY 10952</p>		01/04/2010 10033
01/04/10	Monthly Service	150.00
Sub Total		150.00
NYC Sales Tax		0.00
Total		150.00
Previous Balance		105.84
Payments and Credits		0.00
Balance Due		255.84

Style #3

Style #4 - Bill / Invoice Default Style

ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444		Your LOGO here ABC Company	01/04/10
---	--	--------------------------------------	----------

Andy Able 68 New County Road Monsey NY 10952 ----- 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Inv No.</th> <th style="text-align: left;">Billing Period</th> <th style="text-align: left;">DUE DATE</th> </tr> </thead> <tbody> <tr> <td>10033</td> <td>1/1/2010 01/31/2010</td> <td>01/04/2010</td> </tr> <tr> <td colspan="2">ACCOUNT SUMMARY as of</td> <td>01/04/2010</td> </tr> <tr> <td colspan="2">Previous Balance</td> <td style="text-align: right;">105.84</td> </tr> <tr> <td colspan="2">Payments</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td colspan="2">Current Charges</td> <td style="text-align: right;">150.00</td> </tr> <tr> <td colspan="2">Taxes</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td colspan="2">Sub Total</td> <td style="text-align: right;">150.00</td> </tr> <tr> <td colspan="2">TOTAL AMOUNT DUE</td> <td style="text-align: right;">255.84</td> </tr> </tbody> </table> <div style="text-align: right;"> Home 745-348-4888 </div>	Inv No.	Billing Period	DUE DATE	10033	1/1/2010 01/31/2010	01/04/2010	ACCOUNT SUMMARY as of		01/04/2010	Previous Balance		105.84	Payments		0.00	Current Charges		150.00	Taxes		0.00	Sub Total		150.00	TOTAL AMOUNT DUE		255.84
Inv No.	Billing Period	DUE DATE																										
10033	1/1/2010 01/31/2010	01/04/2010																										
ACCOUNT SUMMARY as of		01/04/2010																										
Previous Balance		105.84																										
Payments		0.00																										
Current Charges		150.00																										
Taxes		0.00																										
Sub Total		150.00																										
TOTAL AMOUNT DUE		255.84																										

Job Location		
Andy Able , 68 New County Road , Monsey NY 10952		

DATE	DESCRIPTION	AMOUNT
01/04/10	Monthly Service	150.00

Style #4
Bill/Invoice Default Style

Please detach and return bottom portion with payment. Retain the top portion for your records

PLEASE RETURN TEAR OFF WITH PAYMENT

Andy Able 68 New County Road Monsey NY 10952 Job Location: Andy Able , 68 New County Road , Monsey NY 10952 ****FLOWERING PLANT SPECIAL**** HALF PRICE SALE ON ROSES & HYDRANGEAS REMEMBER TO WATER!	ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444 <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Invoice Number</td> <td style="width: 40%; text-align: right;">10033</td> </tr> <tr> <td>DUE DATE</td> <td style="text-align: right;">01/04/2010</td> </tr> <tr> <td>AMOUNT DUE</td> <td style="text-align: right;">255.84</td> </tr> <tr> <td>Payment</td> <td></td> </tr> <tr> <td>Check Number</td> <td></td> </tr> </table> Please Make Check Payable to: ABC Company	Invoice Number	10033	DUE DATE	01/04/2010	AMOUNT DUE	255.84	Payment		Check Number	
Invoice Number	10033										
DUE DATE	01/04/2010										
AMOUNT DUE	255.84										
Payment											
Check Number											

Home 745-348-4888

Style # 5

ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%;"> <input type="checkbox"/> Watering Instructions <input type="checkbox"/> Please water around trees thoroughly for 47 days <input type="checkbox"/> No water on plants for 24 hours <input type="checkbox"/> Please water lawn A.S.A.P. <input type="checkbox"/> Please water lawn before mowing <input type="checkbox"/> Please water lawn following mowing <input type="checkbox"/> No water on lawn for <input type="checkbox"/> 24 hours <input type="checkbox"/> 48 hours </td> <td style="width: 50%; text-align: right; vertical-align: top;"> 01/04/10 <input type="checkbox"/> Please water lawn 30-45 minutes <input type="checkbox"/> Please water lawn .5 inch minimum </td> </tr> </table>	<input type="checkbox"/> Watering Instructions <input type="checkbox"/> Please water around trees thoroughly for 47 days <input type="checkbox"/> No water on plants for 24 hours <input type="checkbox"/> Please water lawn A.S.A.P. <input type="checkbox"/> Please water lawn before mowing <input type="checkbox"/> Please water lawn following mowing <input type="checkbox"/> No water on lawn for <input type="checkbox"/> 24 hours <input type="checkbox"/> 48 hours	01/04/10 <input type="checkbox"/> Please water lawn 30-45 minutes <input type="checkbox"/> Please water lawn .5 inch minimum
<input type="checkbox"/> Watering Instructions <input type="checkbox"/> Please water around trees thoroughly for 47 days <input type="checkbox"/> No water on plants for 24 hours <input type="checkbox"/> Please water lawn A.S.A.P. <input type="checkbox"/> Please water lawn before mowing <input type="checkbox"/> Please water lawn following mowing <input type="checkbox"/> No water on lawn for <input type="checkbox"/> 24 hours <input type="checkbox"/> 48 hours	01/04/10 <input type="checkbox"/> Please water lawn 30-45 minutes <input type="checkbox"/> Please water lawn .5 inch minimum		

	Inv No.	Acct No.	Billing Period	DUE DATE
	10033	3113	1/1/2010 01/31/2010	01/04/2010

Andy Able 68 New County Road Monsey NY 10952 ----- Commerical Applicator: Joe Smith License Number: Company #1234 Commerical Operator: License Number(s): App License #1234 Apparatus License:	<table border="1" style="width: 100%;"> <tr> <td colspan="2" style="text-align: right;">ACCOUNT SUMMARY as of 01/04/2010</td> </tr> <tr> <td style="width: 80%;">Previous Balance</td> <td style="text-align: right;">105.84</td> </tr> <tr> <td>Payments</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Current Charges</td> <td style="text-align: right;">150.00</td> </tr> <tr> <td>Taxes</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Sub Total</td> <td style="text-align: right;">150.00</td> </tr> <tr> <td>TOTAL AMOUNT DUE</td> <td style="text-align: right;">255.84</td> </tr> </table>	ACCOUNT SUMMARY as of 01/04/2010		Previous Balance	105.84	Payments	0.00	Current Charges	150.00	Taxes	0.00	Sub Total	150.00	TOTAL AMOUNT DUE	255.84
ACCOUNT SUMMARY as of 01/04/2010															
Previous Balance	105.84														
Payments	0.00														
Current Charges	150.00														
Taxes	0.00														
Sub Total	150.00														
TOTAL AMOUNT DUE	255.84														

Job Location
Andy Able , 68 New County Road , Monsey NY 10952

DATE	DESCRIPTION	AMOUNT
01/04/10	Monthly Service	150.00

Style #5

Please detach and return bottom portion with payment. Retain the top portion for your records

PLEASE RETURN TEAR OFF WITH PAYMENT


Andy Able 68 New County Road Monsey NY 10952	ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444
--	--

Product	EPA No.	Qty P100 Gal	Wind	W Dir	Temp	Time

Invoice Number	10033
DUE DATE	01/04/2010
AMOUNT DUE	255.84
Payment	
Check Number	

Please Make Check Payable to:
ABC Company

Style #6

ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444	01/04/10
	Inv No. 10033
Target Pest	_____
	
Andy Able 68 New County Road Monsey NY 10952	
	Style #6
CHARGES AND CREDITS	
Monthly Service	150.00
****FLOWERING PLANT SPECIAL****	
HALF PRICE SALE ON ROSES & HYDRANGEAS	
REMEMBER TO WATER!	
PLEASE RETURN TEAR OFF WITH PAYMENT	
Previous Bal:	
Total	_____

Style #7

		Date	01/04/2010
		Invoice No.	10033
Andy Able 68 New County Road Monsey NY 10952		*****FLOWERING PLANT SPECIAL***** HALF PRICE SALE ON ROSES & HYDRANGEAS REMEMBER TO WATER!	

DATE	DESCRIPTION	AMOUNT
01/04/10	Monthly Service	150.00

Style #7

Sub Total	150.00
NYC Sales Tax	0.00
Total	150.00
Previous Balance	105.84
Payments and Credits	0.00
TOTAL AMOUNT DUE	255.84

PLEASE RETURN TEAR OFF WITH PAYMENT

Bill To: Andy Able 68 New County Road Monsey NY 10952	Job Location: Andy Able 68 New County Road Monsey NY 10952	Date 01/04/2010 Invoice No. 10033
--	---	--

255.84

Style #8

ABC Company
 126 Valley Road
 Glen Rock, NJ 07452
 (845)111-2222 Fax (845)333-4444

January

Date

01/04/10

No.

10033

Target Pest

Style #9

ABC Company
 126 Valley Road
 Glen Rock, NJ 07452
 (845)111-2222 Fax (845)333-4444

01/04/10 10033

Sub Total	150.00
Taxes	0.00
Total Charges	150.00
Previous Balance	105.84
Payments	0.00
Balance Due	255.84



Andy Able
 68 New County Road
 Monsey NY 10952

Job Location: Andy Able , 68 New County Road ,
 Monsey NY 10952

*****FLOWERING PLANT SPECIAL*****
HALF PRICE SALE ON ROSES & HYDRANGEAS


PLEASE RETURN TEAR OFF WITH PAYMENT

REMEMBER TO WATER!

DATE	DESCRIPTION	AMOUNT
01/04/10	Monthly Service	150.00


Style #9

Style #10

ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444		Your LOGO here ABC Company	01/04/10
--	--	-----------------------------------	----------

	Acct No.	Inv No.	Billing Period	DUE DATE
	3113	10033	1/1/2010 01/31/2010	01/04/2010

Andy Able 68 New County Road Monsey NY 10952 ----- Job Location: Andy Able , 68 New County Road , Monsey NY 10952	<table border="0" style="width: 100%;"> <tr> <td colspan="2" style="text-align: right;">ACCOUNT SUMMARY as of</td> <td style="text-align: right;">01/04/2010</td> </tr> <tr> <td style="width: 60%;">Previous Balance</td> <td></td> <td style="text-align: right;">105.84</td> </tr> <tr> <td>Payments</td> <td></td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Current Charges</td> <td></td> <td style="text-align: right;">150.00</td> </tr> <tr> <td>Taxes</td> <td></td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Sub Total</td> <td></td> <td style="text-align: right;">150.00</td> </tr> <tr> <td colspan="2" style="border-top: 1px solid black;">TOTAL AMOUNT DUE</td> <td style="text-align: right; border-top: 1px solid black;">255.84</td> </tr> </table>	ACCOUNT SUMMARY as of		01/04/2010	Previous Balance		105.84	Payments		0.00	Current Charges		150.00	Taxes		0.00	Sub Total		150.00	TOTAL AMOUNT DUE		255.84
ACCOUNT SUMMARY as of		01/04/2010																				
Previous Balance		105.84																				
Payments		0.00																				
Current Charges		150.00																				
Taxes		0.00																				
Sub Total		150.00																				
TOTAL AMOUNT DUE		255.84																				

	
---	--

DATE	DESCRIPTION	AMOUNT
01/04/10	Monthly Service	150.00


Style #10

Please detach and return bottom portion with payment. Retain the top portion for your records



PLEASE RETURN TEAR OFF WITH PAYMENT

Andy Able 68 New County Road Monsey NY 10952 Job Location: Andy Able , 68 New County Road , Monsey NY 10952	ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444
--	--

*****FLOWERING PLANT SPECIAL***** HALF PRICE SALE ON ROSES & HYDRANGEAS REMEMBER TO WATER!	<table border="0" style="width: 100%;"> <tr> <td style="width: 60%;">Invoice Number</td> <td style="text-align: right;">10033</td> </tr> <tr> <td>DUE DATE</td> <td style="text-align: right;">01/04/2010</td> </tr> <tr> <td>AMOUNT DUE</td> <td style="text-align: right;">255.84</td> </tr> <tr> <td>Payment</td> <td></td> </tr> <tr> <td>Check Number</td> <td></td> </tr> </table> <p style="font-size: small;">Please Make Check Payable to: ABC Company</p>	Invoice Number	10033	DUE DATE	01/04/2010	AMOUNT DUE	255.84	Payment		Check Number	
Invoice Number	10033										
DUE DATE	01/04/2010										
AMOUNT DUE	255.84										
Payment											
Check Number											

	
---	--

Style #11

ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444		 		Your LOGO here ABC Company																
		Invoice # 10033 Date 01/04/10																		
Andy Able 68 New County Road Monsey NY 10952		*****FLOWERING PLANT SPECIAL***** HALF PRICE SALE ON ROSES & HYDRANGEAS REMEMBER TO WATER!																		
<hr/> Job Location : Andy Able , 68 New County Road , Monsey NY 10952																				
<table border="0" style="width: 100%;"> <thead> <tr> <th colspan="2" style="text-align: center;">DESCRIPTION</th> <th></th> </tr> </thead> <tbody> <tr> <td style="width: 60%;">Monthly Service</td> <td></td> <td style="text-align: right;">150.00</td> </tr> <tr> <td colspan="2"><hr/></td> <td></td> </tr> <tr> <td>Total</td> <td></td> <td style="text-align: right;">\$ 255.84</td> </tr> <tr> <td colspan="3">PLEASE RETURN TEAR OFF WITH PAYMENT</td> </tr> </tbody> </table>						DESCRIPTION			Monthly Service		150.00	<hr/>			Total		\$ 255.84	PLEASE RETURN TEAR OFF WITH PAYMENT		
DESCRIPTION																				
Monthly Service		150.00																		
<hr/>																				
Total		\$ 255.84																		
PLEASE RETURN TEAR OFF WITH PAYMENT																				

Style #11

Style #11

ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444	10033	01/04/2010
--	-------	------------



DUE DATE 01/04/2010

 *****FLOWERING PLANT SPECIAL*****
 HALF PRICE SALE ON ROSES &
 HYDRANGEAS

 REMEMBER TO WATER!

Andy Able
 68 New County Road
 Monsey NY 10952

>-----<

DATE	DESCRIPTION	GAL	PRICE	NJ	ROC	OR	TOTALS
01/04/10	Monthly Service	1.00	150.00	0.00	0.00	0.00	150.00
Sub Total							150.00
Total Charges							150.00
Previous Balance							105.84
Payments and Credits							0.00
Balance Due							255.84

Style #1001

Please detach and return bottom portion with payment. Retain the top portion for your records
 PLEASE RETURN TEAR OFF WITH PAYMENT

Andy Able
 68 New County Road
 Monsey NY 10952

ABC Company
 126 Valley Road
 Glen Rock, NJ 07452
 (845)111-2222 Fax (845)333-4444



Invoice Number	10033
AMOUNT DUE	255.84
Payment	
Check Number	

Please Make Check Payable to: ABC Company

Routes

Routes – Create

VIDEO – Create a Route

Routes are a way of creating a list of your accounts for scheduling work. The routes can later be used to apply charges to your accounts.

1. To create a route, first provide a name for the route and press Add Name

Modify Routes

Route | Add Accounts | Apply Job Codes | Account Info | Job Descriptions | Setup | BILLMASTER On The Go

Menu:

- + Create / Rename Route Name (highlighted with red arrow)
- Print Route
- Add Account to Route
- Copy Route
- Find Nearest Account to add to route

Buttons: + Create/Rename Route, ✖ Delete Route, Find Near

City	Route / Tec	Route	No.
Georgetown	Glen	01 Mon	0
Georgetown	Glen	02 Tue	4
Georgetown	Glen	03 Wed	0
Georgetown	Glen	04 Thu	0
Georgetown	Glen	05 Fri	0
Nichola...	Jamie	06 Sat	0
Georgetown	Glen	07 Sun	0

Notes and Job Codes | Chemical Codes | Notes 2

Crew / Worker:

Route notes 1:

Job Codes 1-10:

-
-
-
-
-
-
-
-
-
-

Table: Accounts on Route

Accounts on Route	Crew/Worker	Street	City	Job
Abby Stevenson		152 Robin Rd.	Georgetown	Glen
Action Equipment		109 Demand Ct.	Georgetown	Glen
Adam Stowe		115 Ridgeview Dr.	Georgetown	Glen
Alan Rich		187 Lakeshore Dr.	Georgetown	Glen
Alan Slusher		600 Delany Woods	Nichola...	Jamie
Albert Plunkett		105 Tim Tam Trail	Georgetown	Glen
Alex Davenport				Glen
Alicia House		1217 Crumbaugh	Georgetown	Jimmy
Allison Briggs		109 Copperfield Dr.	Georgetown	Glen
Ally & Jeremy Bar...		3384 Emerson Woods Rd.	Lexington	Jimmy
Amanda Kinman		401 Highland Ave.	Georgetown	Jimmy
Amanda Neace		1338 Fairfax Way	Georgetown	Glen
Amanda Shapaka		10836 Cedar Dr.	Catlett...	Jimmy
Amanda Thorpe		173 Keelridge Dr.	Georgetown	Glen
Amazing Pest Control		822 Palisade Ave.	Teaneck	Glen
Amber Ott		202 Paynes Landing	Georgetown	Jimmy
Amy Baron		481 General John Payne	Georgetown	Jimmy
Amy Barron		102 Summerridge Way	Georgetown	Jamie
Amy Barron (Remax...		128 Edwards Dr.	Georgetown	Glen
Amy Barron 001		198 Victoria Way	Georgetown	Jimmy
Amy Barron 002		128 Edwards Dr.	Georgetown	Jimmy
Amy Barron 003		128 Edwards Ave	Georgetown	Glen

Record 1 of 1534

☒ (Filter by Company) Edit Filter

Routes – Add Accounts, Change Order and Enter Notes.

[VIDEO – Change Route Order](#)

[VIDEO – Add to Route based on distance](#)

Once you have created the Route name, you can add / modify the accounts that belong to the route.

1. Select accounts to add them to route
2. Route Selected
3. Notes for this account
4. Jobs to be done for accounts on the route. Select on the customer name in the account on route area to enter in Route Notes and Job Codes for the customer.

Modify Routes

Route Add Accounts Apply Job Codes Account Info Job Descriptions Setup BILLMASTER On The Go

Select Accounts to add to route

Menu Name	Street	City	Route / Tec
(Sharon) Shar Gol...	100 Falcon Ct.	Georgetown	Glen
Abby Stevenson	152 Robin Rd.	Georgetown	Glen
Action Equipment	109 Demand Ct.	Georgetown	Glen
Adam Stowe	115 Ridgeview Dr.	Georgetown	Glen
Alan Rich	187 Lakeshore Dr.	Georgetown	Glen
Alan Slusher	600 Delany Woods	Nichola...	Jamie
Albert Plunkett	105 Tim Tam Trail	Georgetown	Glen
Alex Davenport			Glen
Alicia House	1217 Crumbaugh	Georgetown	Jimmy
Allison Briggs	109 Copperfield Dr.	Georgetown	Glen
Ally & Jeremy Bar...	3384 Emerson Woods Rd.	Lexington	Jimmy
Amanda Kinman	401 Highland Ave.	Georgetown	Jimmy
Amanda Neace	1338 Fairfax Way	Georgetown	Glen
Amanda Shapaka	10836 Cedar Dr.	Catlett...	Jimmy
Amanda Thorpe	173 Keelridge Dr.	Georgetown	Glen
Amazing Pest Control	822 Palisade Ave.	Teaneck	Glen
Amber Ott	202 Paynes Landing	Georgetown	Jimmy
Amy Baron	481 General John Payne	Georgetown	Jimmy
Amy Barron	102 Summerridge Way	Georgetown	Jamie
Amy Barron (Remax...	128 Edwards Dr.	Georgetown	Glen
Amy Barron 001	198 Victoria Way	Georgetown	Jimmy
Amy Barron 002	128 Edwards Dr.	Georgetown	Jimmy
Amy Barron 003	128 Edwards Ave	Georgetown	Glen

Route: 01 Mon No. 0, 02 Tue No. 4, 03 Wed No. 0, 04 Thu No. 0, 05 Fri No. 0, 06 Sat No. 0, 07 Sun No. 0

Notes and Job Codes | Chemical Codes | Notes 2

Crew / Worker:
 Route notes 1:
 Job Codes 1-10: 1. , 2. , 3. , 4. , 5. , 6. , 7. , 8. , 9. , 10.

Code Description Price
 1 2 3 4

Accounts on Route | Crew/Worker | Street | City | Job

Record 1 of 1534
☒ (Filter by Company) Edit Filter


Routes – Print Routes

You can select from a variety of Route / Worksheet print styles by selecting the Truck Icon. The Route report can also contain Route Notes for your customer along with phone number, property size, etc.

[VIDEO – Print Routes](#)

Sample Route Sheets

Style #1

<div>  </div>					
<div> <div>ABC Company</div> <div>01 Monday - Crew 1</div> <div>As of : 01/04/2010</div> </div>					
Menu Name	Address	City	Phone 1	Phone 2	Phone 3
1. Able, Andy	58 New County Road	Monsey	745-348-4888		
2. Ainsworth, Sally	270 Marton Rd.	Wync off	241-485-8025	--	--
3. Berger George & Sarah	17 Surrey Lane	Mahwah	251-818-2716	--	--
4. Baines Mary	78 Heather Ln.	Malapan	234-529-2526	201-417-2132	--
5. Augusto, Carl & Sue	1 Trotters Lane	Mahwah	276-529-5653	--	--
6. Andriod, Sam	123 Winslow Terrace	glen rock			
7. Anderson Ken & Emma	77 Sun Valley Rd.	Ramsey			
8. Cinco Lou & Janet	17 Snow Drive	Mahwah			
9. Kapiloff, Gerald & Ter	163 Miller Rd.	Mahwah	201-252-2662	201-623-4747	--
10. Kelly Robert	7 Crestwood Drive	Suffern	845-369-7982	--	--
11. Kronenberg, Bill & Jan	54 Mill Glen Rd.	Upper Sad	201-236-1420	--	201-819-4232
12. Liebhof Anita	107 Fisher Rd	Mahwah	201-236-2953	--	--
13. Napolitano, Paul	155 Airmount Rd.	Mahwah	--	--	--
14. Masi Steve & Maryann	4 Squire Ct.	Mahwah	201-529-1238	201-265-5400	--
15. Marcellly, Jerome	123 Meadow Hill Rd.	Newburgh	845-566-1005	--	--
16. Poser, Steve & Lisa	123 Farm Hill Rd.	Upper Sad	201-825-2136	--	--
17. Sme Howard & Grace	26 Haring Lane	Mahwah	201-818-2628	212-916-2536	201-887-0299
18. Rob's Cafe	100 Main Street	Spring Va			

Style #2

<div> <div>ABC Company</div> <div>01 Monday - Crew 1</div> <div> <div>Menu Name</div> <div>Address</div> <div>City</div> <div>Phone 1</div> <div>Phone 2</div> </div> </div>					<div> <div>As of :</div> <div>01/04/2010</div> </div>	
1.	Able, Andy	68 New County Road	Monsey	745-348-4888		
2.	Ainsworth, Sally	370 Marton Rd.	Wycoff	241-485-8025	--	
3.	Berger George & Sarah	17 Surrey Lane	Mahwah	251-818-2716	--	
4.	Baines Mary	78 Heather Ln.	Malapan	234-529-3526	201-417-2192	
5.	Augusto, Carl & Sue	1 Trotters Lane	Mahwah	276-529-5653	--	
6.	Andriod, Sam	133 Winslow Terrace	glen rock	241-934-5569	--	
7.	Anderson Ken & Emma	77 Sun Valley Rd.				
8.	Cinco Lou & Janet	17 Snow Drive				
9.	Kapiloff, Gerald & Terry	163 Miller Rd.	Mahwah	201-252-2662	201-633-4747	
10.	Kelly Robert	7 Crestwood Drive	Suffern	845-369-7982	--	
11.	Kronenberg, Bill & Janice	54 Mill Glen Rd.	Upper Sad	201-236-1430	--	
12.	Liebhof Anita	107 Fisher Rd	Mahwah	201-236-2953	--	
13.	Napolitano, Paul	155 Airmount Rd.	Mahwah	--	--	
14.	Masi Steve & Maryann	4 Squire Ct.	Mahwah	201-529-1238	201-265-5400	
15.	Martelly, Jerome	123 Meadow Hill Rd.	Newburgh	845-566-1005	--	
16.	Pomer, Steve & Lisa	123 Faon Hill Rd.	Upper Sad	201-825-3136	--	
17.	Sze Howard & Grace	26 Haring Lane	Mahwah	201-818-3638	212-916-2536	
18.	Rob's Cafe	100 Main Street	Spring Va			

Style #3

ABC Company			
01 Monday - Crew 1		As of : 01/04/2010	
Menu Name	Address	City	Phone 1
1. Able, Andy	68 New County Road	Monsey	745-248-4888
2. Ainsworth, Sally	370 Marton Rd.	Wycoff	241-485-8025
3. Berger George & Sarah	17 Surrey Lane	Mahwah	251-818-2716
4. Baines Mary	78 Heather Ln.	Malapan	224-529-2526
5. Augusto, Carl & Sue	1 Trotters Lane	Mahwah	276-529-5653
6. Andriod, Sam	123 Winslow Terrace	glen rock	241-934-5569
7. Anderson Ken & Emma	77 Sun Valley Rd.	Ramsey	241-934-0290
8. Cinco Lou & Janet	17 Snow	Mahwah	201-512-8871
9. Kapiloff, Gerald & Terry	163 Mi	Mahwah	201-252-2662
10. Kelly Robert	7 Crestwood Drive	Suffern	845-269-7982
11. Kronenberg, Bill & Janice	54 Mill Glen Rd.	Upper Sad	201-236-1430
12. Liebhof Anita	107 Fisher Rd	Mahwah	201-236-2953
13. Napolitano, Paul	155 Airmount Rd.	Mahwah	--
14. Masi Steve & Maryann	4 Squire Ct.	Mahwah	201-529-1238
15. Marcelly, Jerome	123 Meadow Hill Rd.	Newburgh	845-566-1005
16. Pomer, Steve & Lisa	123 Paem Hill Rd.	Upper Sad	201-825-2136
17. Sze Howard & Grace	26 Haring Lane	Mahwah	201-818-2638
18. Bob's Cafe	100 Main Street	Spring Va	

Style #3

Style #4

ABC Company			
01 Monday - Crew 1		As of : 01/04/2010	
Menu Name	Address	City	Phone 1
1. Able, Andy Watch for Dog	68 New County Road	Monsey	745-348-4888
2. Ainsworth, Sally Park on Side Street	370 Marton Rd.	Wyckoff	241-485-8025
3. Berger George & Sarah Watch for Dog	17 Surrey Lane	Mahwah	251-818-2716
4. Baines Mary	78 Heather Ln.	Malapan	234-529-3526
5. Augusto, Carl & Sue	1 Trotters Lane	Mahwah	276-529-5653
6. Andriod, Sam Watch for Dog	123 Winslow Terrace	glen rock	241-334-5569


Style #4

Style #5

ABC Company			
01 Monday - Crew 1		As of : 01/04/2010	
Menu Name	Address	City	Phone 1
1. Able, Andy Watch for Dog	68 New County Road	Monsey	745-248-4888
2. Ainsworth, Sally Park on Side Street	270 Marton Rd.	Wycoff	241-485-8025
3. Berger George & Sarah Watch for Dog	17 Surrey Lane	Mahwah	251-618-2716
4. Baines Mary	78 Heather Ln.	Malapan	234-529-3526
5. Augusto, Carl & Sue	1 Trotters Lane	Mahwah	276-529-5653
6. Andriod, Sam Watch for Dog	132 Winslow Terrace	glen rock	241-934-5569
7. Anderson Ken & Emma	77 Sun Valley Rd.	Ramsey	241-934-0290
8. Cinto Lou & Janet	17 Snow Drive	Mahwah	201-512-8871

Style #5

Style #6

ABC Company			
01 Monday - Crew 1		As of : 01/04/2010	
Menu Name	Address	City	Phone 1
1. Able, Andy Watch for Dog	68 New County Road	Monsey	745-348-4888
2. Ainsworth, Sally Park on Side Street	370 Marton Rd.	Wyckoff	241-485-8025
3. Berger George & Sarah Watch for Dog	17 Surrey Lane	Mahwah	251-818-2716
4. Baines Mary	78 Heather L	Lapan	234-529-3526
5. Augusto, Carl & Sue	1 Trotters Lane	Mahwah	276-529-5653
6. Andriod, Sam Watch for Dog	133 Winslow Terrace	glen rock	241-934-5569
7. Anderson Ken & Emma	77 Sun Valley Rd.	Ramsey	241-934-0290
8. Cinco Lou & Janet	17 Snow Drive	Mahwah	201-512-8871
9. Kapiloff, Gerald & Terry	163 Miller Rd.	Mahwah	201-252-2662

Style #6

Style #7

Menu Name		Address	City	Phone 1
1.	Able, Andy Watch for Dog	66 New County Road	Monsey	745-348-4888
2.	Ainsworth, Sally Park on Side Street	370 Marton Rd.	Wyckoff	241-485-8825
3.	Berger George & Sarah Watch for Dog	17 Surrey Lane	Mahwah	251-818-2716
4.	Baines Mary	78 Heather Ln.	Malapan	234-529-3526
5.	Augusto, Carl & Sue	1 Trotters Lane		276-529-5652
6.	Andriod, Sam Watch for Dog	133 Winslow Terrace	glen rock	241-934-5569
7.	Anderson Ken & Emma	77 Sun Valley Rd.	Ramsey	241-934-0290
8.	Cinco Lou & Janet	17 Snow Drive	Mahwah	201-512-8871
9.	Kapiloff, Gerald & Terry	163 Miller Rd.	Mahwah	201-252-2662
10.	Kelly Robert	7 Crestwood Drive	Suffern	845-269-7982
11.	Kronenberg, Bill & Janice	54 Mill Glen Rd.	Upper Sad	201-236-1430
12.	Liebhof Anita	107 Fisher Rd	Mahwah	201-236-2953
13.	Napolitano, Paul	155 Airmount Rd.	Mahwah	--

Style #7

Style #8

<p>Andy Able 68 New County Road Monsey NY 10952 Watch for Dog</p>	<p>Ms. Sally Ainsworth 370 Marton Rd. Wycoff NJ 07481 Park on Side Street</p>	<p>Mr & Mrs George Berger 17 Surrey Lane Mahwah NJ 07430 Watch for Dog</p>	<p>Mrs. Mary Baines 78 Heather Ln. Malapan NJ 07477</p>
<p>Mr & Mrs Carl Augusto 1 Trotters Lane Mahwah NJ 07430</p>	<p>Mr. & Mrs. Sam Andriod 133 Winslow Terrace glen rock NJ 07462 Watch for Dog</p>	<p>Mr & Mrs Ken Anderson 77 Sun Valley Rd. Ramsey NJ 07446</p>	<p>Mr. Louis Cinco Mrs. Janet Tuffy 17 Snow Drive Mahwah NJ 07430</p>
<p>Mr. Gerald Kapiloff 163 Miller Rd. Mahwah NJ 07430</p>	<p>Mr & Mrs Robert Kelly 7 Crestwood Drive Suffern NY 10901</p>	<p>Mr & Mrs Bill Kronenberg 54 Mill Glen Rd. Upper Saddle River NJ 07468</p>	<p>Mrs Anita Liebhof 107 Fisher Rd Mahwah NJ 07430</p>
<p>Mr Paul Napolitano 155 Airmount Rd. Mahwah NJ 07430</p>	<p>Mr & Mrs Steve Masi 4 Squire Ct. Mahwah NJ 07430</p>	<p>Mr. Jerome Marcelly 123 Meadow Hill Rd. Newburgh NY 12550</p>	<p>Mr & Mrs Steve Pozer 123 Fawn Hill Rd. Upper Saddle River NJ 07468</p>
<p>Mr & Mrs Sze 26 Haring Lane Mahwah NJ 07430</p>	<p>Rob's Cafe 100 Main Street Spring Valley NY 10977</p>		

Style #8

Style #9

Menu Name		Address	City	Phone 1
1.	Able, Andy	68 New County Road	Monsey	745-348-4888
DATE: _____ #B&G3		Total Area:	Turf Area:	
Watch for Dog				
2.	Sinsworth, Sally	370 Marton Rd.	Wycoff	241-485-8025
DATE: _____ #B&G3		Total Area: 9885	Turf Area: 0	
Park on Side Street				
3.	Berger George & Sarah	17 Surrey Lane	Mahwah	251-818-2716
DATE: _____ #B&G3		Total Area: 0	Turf Area: 5800	
Watch for Dog				
4.	Baines Mary	78 Heather Ln.		234-529-3526
DATE: _____ #B&G3		Total Area: 0	Turf Area: 16000	
5.	Augusto, Carl & Sue	1 Trotters Lane	Mahwah	276-529-5653
DATE: _____ #B&G3		Total Area: 0	Turf Area: 18665	
6.	Andriod, Sam	133 Winslow Terrace	glen rock	241-334-5569
DATE: _____ #B&G3		Total Area: 23499	Turf Area: 9900bv99	
Watch for Dog				
7.	Anderson Ken & Emma	77 Sun Valley Rd.	Ramsey	241-334-0290
DATE: _____ #B&G3		Total Area: 0	Turf Area: 21000	
8.	Cinco Lou & Janet	17 Snow Drive	Mahwah	201-512-8871


Style #9


Style #10

ABC Company				As of : 01/04/2010	
01 Monday - Crew 1		Job Total		0.00 Job Total 2 0.00	
Menu Name		Address		City Phone 1	
1.	Able, Andy	68 New County Road	Monsey	745-248-4888	
Watch for Dog					
2.	Ainsworth, Sally	370 Marton Rd.	Wycoff	241-485-8025	
Park on Side Street					
3.	Berger George & Sarah	17 Surrey Lane	Mahwah	251-818-2716	
Watch for Dog					
4.	Baines Mary	78 Heather Ln.	Malapan	234-529-3526	
5.	Augusto, Carl & Sue	1 Trotters Lane		276-529-5653	
6.	Andriod, Sam	133 Winslow Terrace	glen rock	241-934-5569	
Watch for Dog					
7.	Anderson Ken & Emma	77 Sun Valley Rd.	Ramsey	241-934-0290	
8.	Cinco Lou & Janet	17 Snow Drive	Mahwah	201-512-8871	
9.	Kapiloff, Gerald & Terry	163 Miller Rd.	Mahwah	201-252-2662	
10.	Kelly Robert	7 Crestwood Drive	Suffern	845-269-7982	

Style #10

Style #11

ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444	January	Date	01/04/10	No.	1139
	IN	am	pm	OUT	am pm
Target Pest _____					
					
Andy Able 68 New County Road Monsey NY 10952	Andy Able 68 New County Road Monsey NY 10952				
Home 745-348-4888					
CHEMICAL USED		÷	AMOUNT		Previous Balance
USED1-Demon Max		0.01 ÷			255.84
2-Termidor 3C		0.06 ÷			
3-Syngenta Weather Blok XT					code 50
4-Talon G Rodenticide Mini Pellets					55.00
5-Max Force Pro. Insect Control Roach Gel					Service Call
6-Howard Johnson Permethrin Granulelle		0.25 ÷			66.00
7-250 Propoxur Residual Insecticide		1.00 ÷			
8-Perma-Dust Pressurized Boric Acid Dust		25.50 ÷			Thatching of lawn
9-					10- 200.00
Kitchen _____ Bathroom _____ Living _____ Cracks/Crawls _____ Outside _____ Fan Spray _____ PEOPLE/PETS STAY OFF TREATED AREA UNTIL DRY					TOTAL 676.84
PLEASE RETURN TEAR OFF WITH PAYMENT					
Technician _____			Customer _____		

ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444	January	Date	01/04/10	No.	1139
	IN	am	pm	OUT	am pm
Target Pest _____					
					
Andy Able 68 New County Road Monsey NY 10952					
Home 745-348-4888					
CHEMICAL USED		÷	AMOUNT		Previous Balance
USED1-Demon Max		0.01 ÷			255.84
2-Termidor 3C		0.06 ÷			
3-Syngenta Weather Blok XT					code 50
4-Talon G Rodenticide Mini Pellets					55.00
5-Max Force Pro. Insect Control Roach Gel					Service Call
6-Howard Johnson Permethrin Granulelle		0.25 ÷			66.00
7-250 Propoxur Residual Insecticide		1.00 ÷			
8-Perma-Dust Pressurized Boric Acid Dust		25.50 ÷			Thatching of lawn
9-					10- 200.00
Kitchen _____ Bathroom _____ Living _____ Cracks/Crawls _____ Outside _____ Fan Spray _____ PEOPLE/PETS STAY OFF TREATED AREA UNTIL DRY					TOTAL 676.84
PLEASE RETURN TEAR OFF WITH PAYMENT					
Technician _____			Customer _____		



Style #11



Style #12

ABC Company		As of : 01/04/2010	
01 Monday - Crew 1			
Menu Name	Address	City	Phone 1
1. Able, Andy	68 New County Road	Monsey	745-248-4888
Date of Work _____	# Men _____	Time Start _____	Time Finish _____
Yards _____			
Watch for Dog			
2. Ainsworth, Sally	370 Marton Rd.	Wyckoff	241-485-8025
Date of Work _____	# Men _____	Time Start _____	Time Finish _____
Yards _____			
Park on Side Street			
3. Berger George & Sarah	17 Surrey Lane	Mahwah	251-818-2716
Date of Work _____	# Men _____	Time Start _____	Time Finish _____
Yards _____			
Watch for Dog			
4. Baines Mary	78 Heather Ln.	Mahwah	241-529-2526
Date of Work _____	# Men _____	Time Start _____	Time Finish _____
Yards _____			
5. Augusto, Carl & Sue	1 Trotters Lane	Mahwah	276-529-5653
Date of Work _____	# Men _____	Time Start _____	Time Finish _____
Yards _____			
6. Andriod, Sam	133 Winslow Terrace	glenn rock	241-934-5569
Date of Work _____	# Men _____	Time Start _____	Time Finish _____
Yards _____			
Watch for Dog			
7. Anderson Ken & Emma	77 Sun Valley Rd.	Ramsey	241-934-0290
Date of Work _____	# Men _____	Time Start _____	Time Finish _____
Yards _____			
8. Cinco Lou & Janet	17 Snow Drive	Mahwah	201-512-8871
Date of Work _____	# Men _____	Time Start _____	Time Finish _____
Yards _____			
9. Kapiloff, Gerald & Terry	163 Miller Rd.	Mahwah	201-252-2662

Style #12

Style #13

ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444 		January Date 01/04/10 No. 1157 IN am pm OUT am pm Target Pest _____																																									
Andy Able 68 New County Road Monsey NY 10952 		Job Location: Andy Able, 68 New County Road, Monsey NY 10952 Home 745-348-4888 Prev Bal 255.84 code 50 55.00 Service Call 66.00 TAX 0.00 TO TAL 376.84																																									
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>Service Areas</th> <th>Inspected</th> <th>Treated</th> <th>Check / Other</th> </tr> <tr><td>Kitchen</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Bath (s)</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Living Area(s)</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Basement</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Attic</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Crawl Space</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Garage</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Other</td><td>_____</td><td>_____</td><td>_____</td></tr> </table>		Service Areas	Inspected	Treated	Check / Other	Kitchen	_____	_____	_____	Bath (s)	_____	_____	_____	Living Area(s)	_____	_____	_____	Basement	_____	_____	_____	Attic	_____	_____	_____	Crawl Space	_____	_____	_____	Garage	_____	_____	_____	Other	_____	_____	_____	Visa Mastercard Card No _____ Exp Date _____					
Service Areas	Inspected	Treated	Check / Other																																								
Kitchen	_____	_____	_____																																								
Bath (s)	_____	_____	_____																																								
Living Area(s)	_____	_____	_____																																								
Basement	_____	_____	_____																																								
Attic	_____	_____	_____																																								
Crawl Space	_____	_____	_____																																								
Garage	_____	_____	_____																																								
Other	_____	_____	_____																																								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>Pesticide(s) Applied</th> <th>EPA Reg. Number</th> <th>Mix (Pest. Conc./Diluent)</th> <th>Mix Applied</th> </tr> <tr> <td></td> <td></td> <td>(Total Concentrate Applied)</td> <td>(Total Diluent Applied)</td> </tr> <tr><td>Dupont Avion Ant (Indoxacarb)</td><td>552-664</td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> </table>		Pesticide(s) Applied	EPA Reg. Number	Mix (Pest. Conc./Diluent)	Mix Applied			(Total Concentrate Applied)	(Total Diluent Applied)	Dupont Avion Ant (Indoxacarb)	552-664																															The following information is provided to you to comply with the NJ DEP regulation on NJAC 7:30-9.12. It is designed to inform you of important information concerning pesticide safety. Sanitation, as well as physical and biological control measures, should be considered as another part of a good pest control program. Pesticides may be used as another part of a good pest control program. Pesticides are substances used to control living organisms and vary in degrees of toxicity. Parties interested in general health information, contact the National Pesticide Telecommunications Network at (899) 858-7378 or for EMERGENCIES contact the NJ Poison Control System at (800) 222-1222. NJ Pesticide Control Program: (609) 984-6507. This number is for pesticide regulation information, complaints & health referrals. You should be aware that you may request notification of the exact date(s) of any pesticide application, and a copy of the label for each pesticide that will be used. I, the undersigned, have read and understood the above information and have received the Consumer Information as required by NJAC 7:30-9.12 prior to application.	
Pesticide(s) Applied	EPA Reg. Number	Mix (Pest. Conc./Diluent)	Mix Applied																																								
		(Total Concentrate Applied)	(Total Diluent Applied)																																								
Dupont Avion Ant (Indoxacarb)	552-664																																										
Applicator _____ Date _____		Customer _____																																									

ABC Company 126 Valley Road Glen Rock, NJ 07452 (845)111-2222 Fax (845)333-4444 		January Date 01/04/10 No. 1157 IN am pm OUT am pm Target Pest _____																																									
Andy Able 68 New County Road Monsey NY 10952 		Job Location: Andy Able, 68 New County Road, Monsey NY 10952 Home 745-348-4888 Prev Bal 255.84 code 50 55.00 Service Call 66.00 TAX 0.00 TO TAL 376.84																																									
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>Service Areas</th> <th>Inspected</th> <th>Treated</th> <th>Check / Other</th> </tr> <tr><td>Kitchen</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Bath (s)</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Living Area(s)</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Basement</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Attic</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Crawl Space</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Garage</td><td>_____</td><td>_____</td><td>_____</td></tr> <tr><td>Other</td><td>_____</td><td>_____</td><td>_____</td></tr> </table>		Service Areas	Inspected	Treated	Check / Other	Kitchen	_____	_____	_____	Bath (s)	_____	_____	_____	Living Area(s)	_____	_____	_____	Basement	_____	_____	_____	Attic	_____	_____	_____	Crawl Space	_____	_____	_____	Garage	_____	_____	_____	Other	_____	_____	_____	Visa Mastercard Card No _____ Exp Date _____					
Service Areas	Inspected	Treated	Check / Other																																								
Kitchen	_____	_____	_____																																								
Bath (s)	_____	_____	_____																																								
Living Area(s)	_____	_____	_____																																								
Basement	_____	_____	_____																																								
Attic	_____	_____	_____																																								
Crawl Space	_____	_____	_____																																								
Garage	_____	_____	_____																																								
Other	_____	_____	_____																																								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>Pesticide(s) Applied</th> <th>EPA Reg. Number</th> <th>Mix (Pest. Conc./Diluent)</th> <th>Mix Applied</th> </tr> <tr> <td></td> <td></td> <td>(Total Concentrate Applied)</td> <td>(Total Diluent Applied)</td> </tr> <tr><td>Dupont Avion Ant (Indoxacarb)</td><td>552-664</td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> <tr><td> </td><td></td><td></td><td></td></tr> </table>		Pesticide(s) Applied	EPA Reg. Number	Mix (Pest. Conc./Diluent)	Mix Applied			(Total Concentrate Applied)	(Total Diluent Applied)	Dupont Avion Ant (Indoxacarb)	552-664																															The following information is provided to you to comply with the NJ DEP regulation on NJAC 7:30-9.12. It is designed to inform you of important information concerning pesticide safety. Sanitation, as well as physical and biological control measures, should be considered as another part of a good pest control program. Pesticides may be used as another part of a good pest control program. Pesticides are substances used to control living organisms and vary in degrees of toxicity. Parties interested in general health information, contact the National Pesticide Telecommunications Network at (899) 858-7378 or for EMERGENCIES contact the NJ Poison Control System at (800) 222-1222. NJ Pesticide Control Program: (609) 984-6507. This number is for pesticide regulation information, complaints & health referrals. You should be aware that you may request notification of the exact date(s) of any pesticide application, and a copy of the label for each pesticide that will be used. I, the undersigned, have read and understood the above information and have received the Consumer Information as required by NJAC 7:30-9.12 prior to application.	
Pesticide(s) Applied	EPA Reg. Number	Mix (Pest. Conc./Diluent)	Mix Applied																																								
		(Total Concentrate Applied)	(Total Diluent Applied)																																								
Dupont Avion Ant (Indoxacarb)	552-664																																										
Applicator _____ Date _____		Customer _____																																									

Style #14

ABC Company
126 Valley Road
Glen Rock, NJ 07452
(845)111-2222 Fax (845)333-4444

Andy Able
68 New County Road
Monsey NY 10952

Date 01/04/10 INVOICE No. 1175

Home 745-348-4888

Time		PCO Initials	
Chemical	%	Equipment	
Target Pests			Gal Used

Treated Areas			

DOLLAR VALUE \$			
ACCEPTED BY:			
SALES TAX			
1 1/2% charge, if not paid within thirty days and computed monthly.	TOTAL		

☐ CASH ☐ CHECK ☐ CHARGE

^^ PLEASE PAY FROM THIS INVOICE ^^



NOTE: In the event of unsatisfactory service, please notify company immediately. Thank You

ABC Company
126 Valley Road
Glen Rock, NJ 07452
(845)111-2222 Fax (845)333-4444

Andy Able
68 New County Road
Monsey NY 10952

Date 01/04/10 INVOICE No. 1175

Home 745-348-4888

Time		PCO Initials	
Chemical	%	Equipment	
Target Pests			Gal Used

Treated Areas			

DOLLAR VALUE \$			
ACCEPTED BY:			
SALES TAX			
1 1/2% charge, if not paid within thirty days and computed monthly.	TOTAL		

☐ CASH ☐ CHECK ☐ CHARGE

^^ PLEASE PAY FROM THIS INVOICE ^^



NOTE: In the event of unsatisfactory service, please notify company immediately. Thank You

Style #15

ABC Company					As of :		01/04/2010	
01 Monday - Crew 1								
Zone	Menu Name	Address	City	Phone 1	Notes	Price	Map	
	Able, Andy	68 New County	Monsey	745-348-4888	Watch for Do			
	Ainsworth, Sally	270 Marton Rd	Wycoff	241-485-8025	Park on Side			
	Berger George & Sarah	17 Surrey Lan	Mahwah	251-818-2716	Watch for Do			
	Baines Mary	78 Heather Ln	Malapan	234-529-3526				
	Augusto, Carl & Sue	1 Trotters La	Mahwah	276-529-5653				
	Andriod, Sam	133 Winslow T	glen rock	241-934-5569	Watch for Do			
	Anderson Ken & Emma	77 Sun Valley	Ramsey	241-934-0290				
	Cinco Lou & Janet	17 Snow Drive	Mahwah	201-512-8871				
	Kapiloff, Gerald & Ter	163 Miller Rd	Mahwah	201-252-2662				
	Kelly Robert	7 Crestwood D	Suffern	845-269-7982				
	Kronenberg, Bill & Jan	54 Mill Glen	Upper Sad	201-236-1420				
	Liebhof Anita	107 Fisher Rd	Mahwah	201-236-2953				
	Napolitano, Paul	155 Airmount	Mahwah	--				
	Masi Steve & Maryann	4 Squire Ct.	Mahwah	201-529-1238				
	Marcelly, Jerome	123 Meadow Hi	Newburgh	845-566-1005				
	Poser, Steve & Lisa	123 Farm Hill	Upper Sad	201-825-3136				
	Sue Howard & Grace	26 Haring Lan	Mahwah	201-818-3638				
	Rob's Cafe	100 Main Stre	Spring Va					

Style #15

Recurring Schedule

[VIDEO – Calendar Scheduling](#)

[VIDEO – Pest Control Scheduling / Billing](#)

[VIDEO – Schedule Quarterly Service](#)

[VIDEO – Schedule Monthly & Every 2 Weeks](#)

To set any type of recurring schedule for your customers, follow the steps shown below. The schedule is based on the services you provide for your customers. A customer can have as many services as needed. Each service can be scheduled to recur as needed or just a one time appointment.

Select an account's Standard Charges

Able, Andy

Fast Keys | Setup / Chemical / WDI / Other | Documents

1 of 1

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info | Comments / Service Details

Menu Name: Able, Andy
 Letter: 6
 Status: Green
 Current Balance: 0.00

☐ Apply Service Charge if needed?
☐ Charge Taxes?
 Tax Defaults:

☐ Inactive Account
☐ Send e-Bill
 Rte Notes / Remarks

☐ Option 1
☐ Alert
 Worker / Tech
 Sales Person
 Frequency Default
 Target Organism

Bill To:
 Company
 Personal
 Mr. Andy Able
 Street: 100 Oak Street
 House #: 100
 Garnersville, NY 31313

Job Location
 Prev Addr 2 of 2 Next Addr
 Mr. Andy Able
 100 Oak Street
 House #: 100
 Garnersville, NY 31313

County
 Map Corrdinate
 Zone / Time

Standard Charges

Code	Description	Price	Next Service	Last Char
7	Monthly Serv...	185.00		

Name
 Create Route
 Add to Route
 Delete from Route
 Route Notes
 Change Order

Press the Standard Ch Button

Standard Charges and Scheduling

Once you have entered in a starting date for the service. The day of the week and the week number will be used to set the recurring appointments.

Use the **Update schedule in Calendar** feature on the Standard Charges screen to set appointments.

This will create the appointments in the calendar for you quickly. This will not duplicate appointments, but if you need to recreate appointments for a customer, simply used the **Delete Recurring Appointments** from Calendar feature.

Standard Charges - Type 401

Menu Name : Able, Andy

Charge Taxes: NO

Code to Review: 1 to 10

Find	Code	Description	Price	Delete	Price History
i	7	Monthly Service Charge	185.00	-	\$
i				-	\$
i				-	\$
i				-	\$
i				-	\$
i				-	\$
i				-	\$
i				-	\$
i				-	\$
i				-	\$

Recurring Schedule | Service Agreement | Warranty | Other

Start Date: 3/10/2010 | Frequency: Monthly | AM / PM: PM | Start Hour: 9 | Start Min: 0 | Dur Minutes: 30 | Target Pests: German Cockroach | Chem Used: [Flask Icon]

Enter code for service type, see Job Descriptions to review or add codes.

Enter the starting date for service. Select the day of the week and week number. This will be used for the recurring schedule.

Select the Frequency of the recurrence.

Press Update Schedule in Calendar to create appointments.

Create Appointments (Update Schedule in Calendar)

This will create the appointments in the calendar for you quickly. This will not duplicate appointments, but if you need to recreate appointments for a customer, simply used the **Delete Recurring Appointments** from Calendar feature.

You can also update the calendar schedule for all of your customers, by selecting your accounts from the main menu and then choosing the **Update Calendar Schedule** from the **Estimates/More** menu.

Update Calendar Schedule

Create Appointments Exit Calendar Configuration Standard Charges Print Grid

Customers Selected:

Start Date: 07/02/2010

End Date: 12/31/2013

☐ Exclude Saturdays

☐ Exclude Sundays

☒ Show Existing Appointments in the Appointment Results

☒ Show Created Appointments in the Appointment Results

Note: The frequency (number of days) must be set in the Job Descriptions for the Service to be scheduled

Appointment Results

Menu Name	Balance	Code	Description	Price	Start Date	Appointment Date	Frequency	Comment	Worker

Appointments will be created between the dates shown. You can change the default end date by changing the option the Calendar Configuration. See option "Number of Years to add to Starting Date".

Check these boxes to Exclude Saturday and Sunday when creating appointments.

Note when you press Create Appointments, It will not duplicate any existing appointments, they will be listed as existing.

Press Create Appointments

(company ID)

Record 0 of 0

Edit Filter

Create Appointments – results

Update Calendar Schedule

Create Appointments Exit Calendar Configuration Standard Charges Print Grid

Customers Selected: ☐ Exclude Saturdays ☐ Exclude Sundays

Start Date: ☐ Show Existing Appointments in the Appointment Results

End Date: ☒ Show Created Appointments in the Appointment Results

Note: The frequency (number of days) must be set in the Job Descriptions for the Service to be scheduled

Appointment Results

Menu Name	Balance	Code	Description	Price	Start Date	Appointment Date	Frequency	Comment	Worker
Able, Andy	0.00	7	Monthly Service Charge	185.00	03/10/2010	08/11/2010	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy	0.00	7	Monthly Service Charge	185.00	03/10/2010	09/08/2010	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	10/13/2010	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	11/10/2010	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	12/08/2010	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	01/12/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	02/09/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	03/09/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	04/13/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	05/11/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	06/08/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	07/13/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	08/10/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	09/14/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy				185.00	03/10/2010	10/12/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy	0.00	7	Monthly Service Charge	185.00	03/10/2010	11/09/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy	0.00	7	Monthly Service Charge	185.00	03/10/2010	12/14/2011	Monthly	Week No.:2:Wednesday Appointment created	
Able, Andy	0.00	7	Monthly Service Charge	185.00	03/10/2010	01/11/2012	Monthly	Week No.:2:Wednesday Appointment created	

Appointment Results

Appointments are created. The date, frequency, Week No and Day of Week are listed.

If you need to delete the appointments for a customer. Use the delete appointments on the standard charge screen. This allows you to recreate recurring appointments quickly.

(company ID)

Record 1 of 41

Edit Filter

Printing Route Sheets / Service Tickets

Once services are scheduled into the calendar, select **Print Route from Calendar Schedule**. Then select the date range, technician, etc. to print the route.

The screenshot displays the BILLMASTER II Main Menu with various tabs like Company Select, Search, Filters, Misc, Tracking, and Alternate Menu. The 'Routes' tab is active, showing a list of routes with columns for Menu Name, Group 1, Balance, and Phone 1. A red arrow points to the 'Print Route from Calendar Schedule' option in the 'Print Routes' section. A dialog box titled 'Enter Date Range' is open, showing a date range from 04/01/2015 to 04/30/2015. The dialog also includes a calendar view for April 2015, with the 28th highlighted. Below the calendar, there are fields for 'Route' and 'Worker / Tech', and checkboxes for 'Print only new tickets / slips / items', 'Print only appointments with Job Codes', and 'Select account based on Periodic Schedule'. An information icon (i) is also present.

Menu Name	Group 1	Balance	Phone 1
1 (Sharon) Shar Golding	RES	0.00	111-222-3333
2 Abby Stevenson	RES	0.00	111-222-3333
3 Action Equipment		0.00	111-222-3333
4 Adam Stowe	RES	0.00	111-222-3333
5 Alan Rich		0.00	111-222-3333
6 Alan Slusher		0.00	111-222-3333
7 Albert Plunkett		0.00	111-222-3333
8 Alex Davenport		0.00	111-222-3333
9 Alicia House		0.00	111-222-3333
10 Allison Briggs		133.75	111-222-3333
11 Ally & Jeremy Barnett		0.00	111-222-3333
12 Amanda Kinman		0.00	111-222-3333
13 Amanda Neace		0.00	111-222-3333
14 Amanda Shapaka		0.00	111-222-3333
15 Amanda Thorpe		100.00	111-222-3333
16 Amazing Pest Control	CUST	0.00	111-222-3333
17 Amber Ott		0.00	111-222-3333
18 Amy Baron		0.00	111-222-3333
19 Amy Barron		0.00	111-222-3333
20 Amy Barron (Remax Creative)		0.00	111-222-3333
21 Amy Barron 001		0.00	111-222-3333
22 Amy Barron 002		0.00	111-222-3333
23 Amy Barron 003		0.00	111-222-3333
24 Amy Canham		0.00	111-222-3333
25 Amy Clark		0.00	111-222-3333
26 Amy Conham	CUST	0.00	111-222-3333
27 Amy Crist	RES	0.00	111-222-3333
28 Amy Curtis	RES	0.00	111-222-3333
29 Amy Guenthner		0.00	502-888-0902

Record 5 of 1534

29239.59

Record 0 of 0

Print Service Tickets

18
P.
W
(2
Jo
M
43
T

Print Route / Service Tickets as needed

Check / Other Visa Mastercard
Card No _____
Exp Date _____

Tech Lincoln Date 07/03/10 No. 11373
NJ Lic #-22743B
NY Lic # C0848466 IN _____ am pm OUT _____ am pm

Target Pest Termites Frequency Monthly

Service Date & Time 07/03/10 9:04 AM Service Type One time service Home 845-359-3611
Last Service Date 07/03/10 One time service Prev Bal 0.00

Time Out 10:00 AM TAX 0.00 TOTAL 0.00

Inspect termite stations around exterior of home.

Pesticide(s) Applied	EPA Reg. Number	Mix (Pest Conc./diluent)	Mix Applied	Treatment Code	Equipment Code	Item / Location	Serv/Insp/Treated

Service Areas

___ Kitchen

___ Crawl Space ___ Attic

___ Garage ___ Basement

___ Living Area(s)

___ Exterior Areas

___ Other _____

Pesticide Use Codes

CC - Crack & Crevice

G - General ID - Insect Dust

S - Sport RB - Rodent Bait

V - Void PP - Place Pack Bait

ST - Space Treat TP - Tracking Power

LF - Lin. Feet GB - Gel Bait

Equipment Codes

CS - Comp Air Sprayer BG - Bait Gun

IN - Inspection BP - Back Pack Sprayer

AM - Aerosol Machine PS - Power Spray

HD - Hand Duster IN - Insect Monitors

A - Aerosol GT - Glue Trap

BS - Bait Station ST-Snap Trap TC-TIN CAT

Items

1. Floor wall Junc

2. Wall Void

3. Ceiling Void

4. Cabinets Up

5. Cabinets Lwr 8. Sink

6. Appl Mech 7.Pwr Pan

Appointment Notes

Applicator Signature

Date

Customer Signature

The following information is provided to you to comply with the NJDEP regulation on NJAC 7:30-9.12. It is designed to inform you of important information concerning pesticide safety. Sanitation, as well as physical and biological control measures, should be considered as another part of a good pest control program. Pesticides may be used as another part of a good pest control program. Pesticides are substances used to control living organisms and vary in degrees of toxicity. Parties interested in general health information, contact the National Pesticide Telecommunications Network at (899) 858-7378 or for **EMERGENCIES** contact the NJ Poison Control System at (800) 222-1222. NJ Pesticide Control Program: (609) 984-6507. This number is for pesticide regulation information, complaints & health referrals. You should be aware that you may request notification of the exact date(s) of any pesticide application, and a copy of the label for each pesticide that will be used. I, the undersigned, have read and understood the above information and have received the Consumer Information as required by NJAC 7:30-9.12 prior to application.

117

Customized Business Software, LLC. © 1986-2015 All Rights Reserved.

Production Reports

Production reports allow you to forecast revenue based on the services that scheduled.

The screenshot shows the BILLMASTER II software interface. The title bar reads "BILLMASTER II". Below it is a menu bar with "BILLMASTER II - Main Menu". The main window has a tabbed interface with "Company Select", "ABC Company", "Search / Fast Info / Other", "Filters", "Misc", "Tracking", and "Alternate Menu". A red arrow points to the "Alternate Menu" tab. Below the tabs is a "User List" dropdown menu. The "Reports" menu is open, showing a list of options: "Production - Calendar Based", "Service Agreement / Renewals", "Standard Charges - 1 Code", "Periodic Schedule", "Registry / Profit Loss", "Expenses", "Transaction Searches", and "Special / Other". The "Production - Calendar Based" option is selected, and a sub-menu is open showing "Production - Calendar Based", "Service Completed / To Be Done", and "To Be Done Report". Below the menu is a table with columns: "Menu Name", "Balance", "Phone 1", "Street", and "City". The table contains 13 rows of data, with the 11th row highlighted in blue. To the right of the table is a "Menu Name" dropdown menu with "Ally & Jeremy Barnett" selected.

Menu Name	Balance	Phone 1	Street	City
1 (Sharon) Shar Golding	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2 Abby Stevenson	0.00	111-222-3333	152 Robin Rd.	Georgetown
3 Action Equipment	0.00	111-222-3333	109 Demand Ct.	Georgetown
4 Adam Stowe	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5 Alan Rich	0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6 Alan Slusher	0.00	111-222-3333	800 Delany Woods	Nicholasville
7 Albert Plunkett	0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8 Alex Davenport	0.00	111-222-3333		
9 Alicia House	0.00	111-222-3333	1217 Crumbaugh	Georgetown
10 Allison Briggs	133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11 Ally & Jeremy Barnett	0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12 Amanda Kinman	0.00	111-222-3333	401 Highland Ave.	Georgetown
13 Amanda Moore	0.00	111-222-3333	1228 Fairfax Way	Georgetown

Production Report for 7/1/2010 to 07/31/2010

	Menu Name	Address	City	Code	Desc	Price	Prod Amt	Start Sch Dt	Renewal Dt	Renewal Pr	Sold Date
161.	Unice Turner LLC	342 Unice Turner Pl	Newark	7	Monthly Service C	0.00		07/27/10			
162.			East Oran	7	Monthly Service C	0.00		07/27/10			
163.			Airlawn	7	Monthly Service C	0.00		07/27/10			
164.			Airlawn	7	Monthly Service C	0.00		07/27/10			
165.			Airlawn	7	Monthly Service C	0.00		07/27/10			
166.			New City	7	Monthly Service C	0.00		07/28/10			
167.			New City	7	Monthly Service C	5.00		07/28/10			
168.			iffside	7	Monthly Service C	2.00		07/28/10			
169.			aterson	7	Monthly Service C	0.00		07/28/10			
170.			aterson	7	Monthly Service C	0.00		07/28/10			
171.			aterson	7	Monthly Service C	5.00		07/28/10			
172.			aterson	7	Monthly Service C	0.00		07/28/10			
173.			eaneck	7	Monthly Service C	0.00		07/28/10			
174.			eaneck	7	Monthly Service C	0.00		07/28/10			
175.			East Oran	7	Monthly Service C	0.00		07/29/10			
176.			Edgewood	7	Monthly Service C	5.00		07/30/10			
177.			eaneck	6	Weekly Service Ch	0.00		07/30/10			
178.	I. Gemelli	268 Huyler Street	So. Hacke	7	Monthly Service C	1.35		07/30/10			
Production Report for 7/1/2010 to 07/31/2010					Total	19.80	0.00			0.00	

Production Report can also list and total the Production amount. This the amount used to track inspection visits and their value. Typically this service was pre paid.

Renewals

Renewals print on any form style or report style. You may search on service that are to be renewed or search on the Standard Charges services Month of service.

BILLMASTER II

BILLMASTER II - Main Menu

Company Select: ABC Company Search / Fast Info / Other Filters Misc Tracking Alternate Menu

Account Estimates/More **Reports** Comp/Setup Util User List:

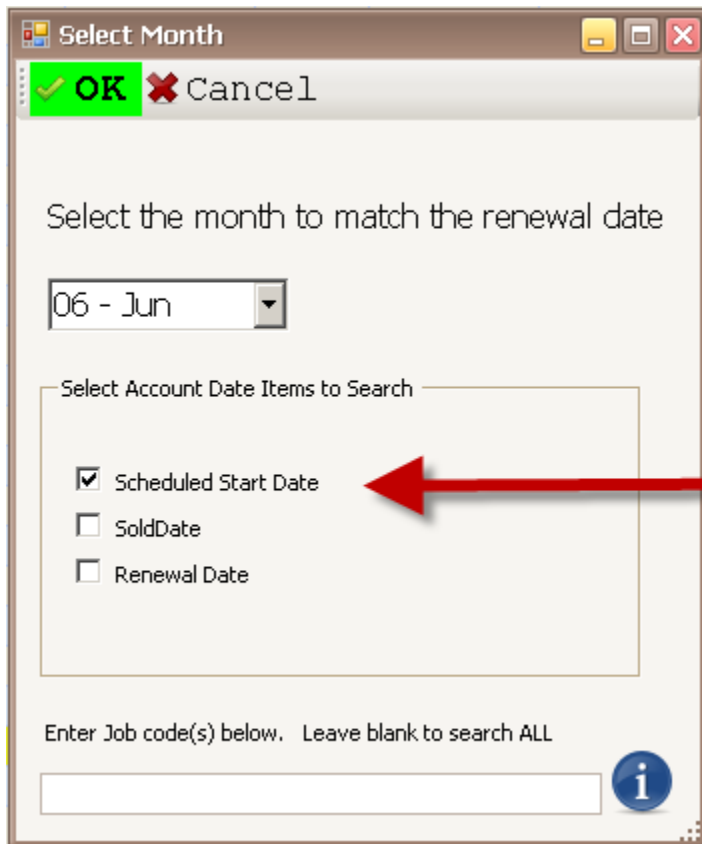
Production - Calendar Based
Service Agreement / Renewals
 Standard Charges - 1 Code
 Periodic Schedule
 Registry / Profit Loss
 Expenses
 Transaction Searches
 Special / Other

Service Agreement
Renewals - Calendar Based
 Renewals - Account Based

Menu Name	Balance	Phone 1	Street	City
1 (Sharon) Shar Golding				
2 Abby Stevenson				
3 Action Equipment				
4 Adam Stowe	RES			
5 Alan Rich				
6 Alan Slusher				
7 Albert Plunkett				
8 Alex Davenport				
9 Alicia House				
10 Allison Briggs	133.75	111-222-3333	109 Copperfield Dr.	Georgetown
▶ 11 Ally & Jeremy Barnett	0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12 Amanda Kinman	0.00	111-222-3333	401 Highland Ave.	Georgetown
13 Amanda Neace	0.00	111-222-3333	1338 Fairfax Way	Georgetown
14 Amanda Shanaka	0.00	111-222-3333	10836 Cedar Dr	Catlettsburg

Menu Name: Ally & Jeremy Barnett

Renewal – Account Based



Select Month

OK Cancel

Select the month to match the renewal date

06 - Jun

Select Account Date Items to Search

- ☒ Scheduled Start Date
- ☐ SoldDate
- ☐ Renewal Date

Enter Job code(s) below. Leave blank to search ALL

i

This examples shows the searching for Renewals based on only the MONTH of the scheduled starting date for the account.

Reports

Reports – Balance Summary

[VIDEO – Report Designer](#)

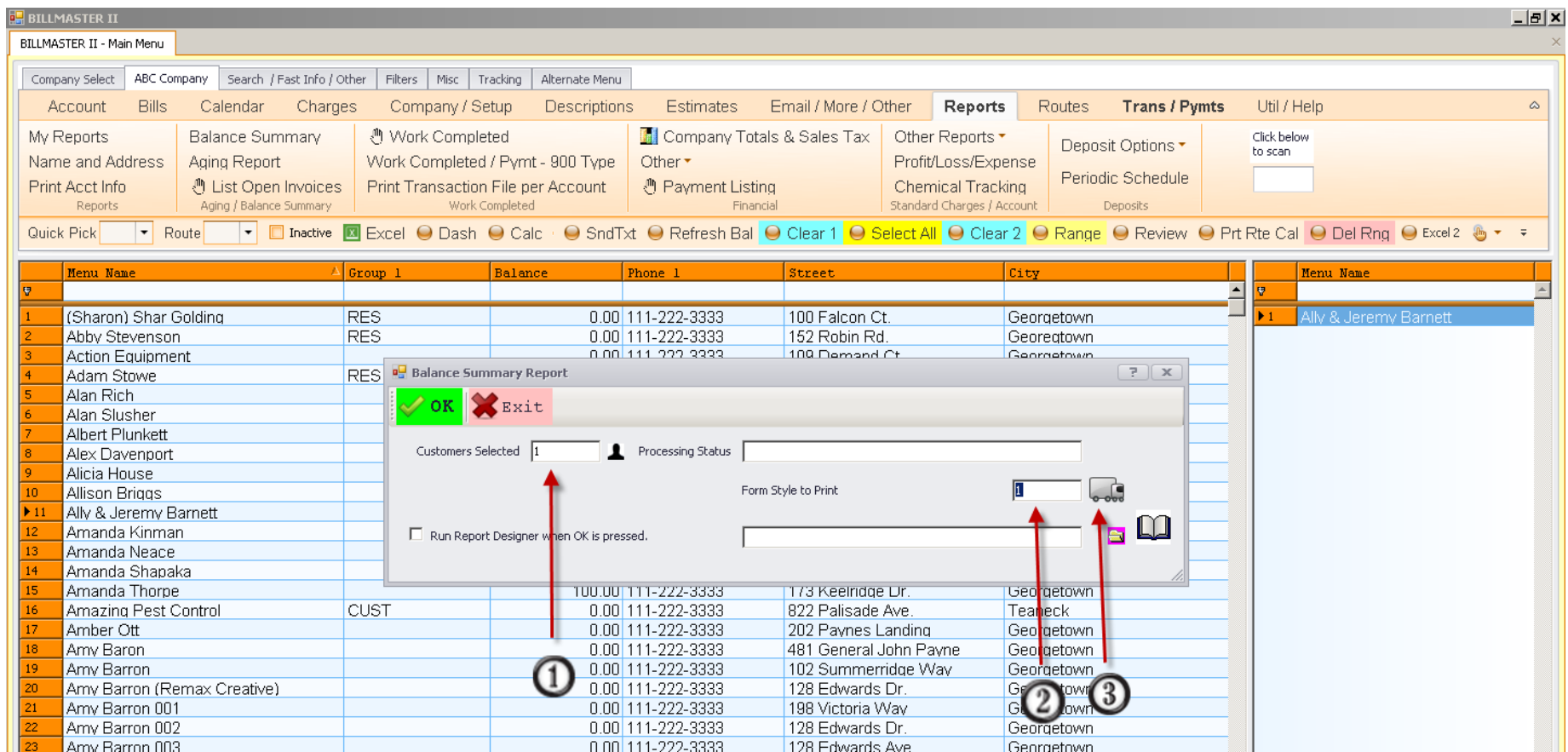
[VIDEO – Reports - Balance Summary](#)

[VIDEO – Reports – Aging Report](#)

This report lists the accounts that are not paying on time. Input the current month and select ALL or selected accounts to review. BILLMASTER will list the Current Balance for the accounts and the amount of money due from the last four previous billing periods. You have a choice of print styles for the report

Reports – Balance Summary – Report Style Selection

1. Number of accounts selected
2. Report Style
3. Selection of Report Style



Reports – Balance Summary –Report Output

ABC Company

Customers - Addl Leaves

Balances remaining from previous bills are shown if not paid within 30 days.

Report as of 12/01/2009 to 12/31/2009

Name, City, Phone Number			Cur Bal	30 Day	60 Day	90 Day	120 Day
1. Able, Andy	Monsey	745-348-4888	303.84	0.00	0.00	0.00	0.00
2. Ainsworth, Sally	Wycoff	241-485-8025	1527.04	0.00	0.00	0.00	0.00
3. Anderson Ken & Emma	Ramsey	241-934-0290	1761.10	0.00	0.00	0.00	0.00
4. Andrew, Jackson	Mahwah	241-236-9149	371.26	0.00	0.00	0.00	0.00
5. Andriod, Sam	glen rock	241-934-5569	56.05	0.00	0.00	0.00	0.00
6. Antwar, Carl & Leeann	Wycoff	234-891-0229	27.93	0.00	0.00	0.00	0.00
7. Apple Bakery	Monsey	745-223-1212	922.14	0.00	0.00	0.00	0.00
8. Augusto, Carl & Sue	Mahwah	276-529-5653	-449.66	0.00	0.00	0.00	0.00
9. Auguston, Stuart & Donna	Mahwah	241-327-4624	9.86	0.00	0.00	0.00	0.00
10. Babridge Joan	Mahwah	271-825-4035	0.01	0.00	0.00	0.00	0.00
11. Barnstock, Ron & Sue	Mahwah	267-848-0478	2712.45	0.00	0.00	0.00	0.00
12. Baron, Alan & Sue	glen rock	281-962-2736	0.19	0.00	0.00	0.00	0.00
13. Bear, Mr & Mrs	Mahwah	221-529-5196	49.68	0.00	0.00	0.00	0.00
14. Becker, Alan & Irene	Mahwah	281-327-6132	0.00	0.00	0.00	0.00	0.00
15. Bendian, Ron & Sue	Mahwah	291-236-3608	5385.23	0.00	0.00	0.00	0.00
16. Berger George & Sarah	Mahwah	251-818-2716	3231.94	0.00	0.00	0.00	0.00
17. Bigwig, Leon	Mahwah	241-252-2733	69.57	0.00	0.00	0.00	0.00
18. Boldman Sam & Sally	Mahwah	271-512-0013	2606.66	85.60	85.60	85.60	85.60
19. Bossner, Jim & Michelle	Ramsey	281-818-4865	244.98	0.00	0.00	0.00	0.00
20. Bottle King	Monsey		2889.00	0.00	0.00	0.00	0.00
21. Bresner Joe & Anne	Mahwah	201-825-1078	131.61	0.00	0.00	0.00	0.00
Totals			21850.88	85.60	85.60	85.60	85.60

Reports – Payments / Deposit Listing

[VIDEO – Reports – Payment Listing](#)

This function lists payments of all of your accounts within the entered period and totals the payments within that period. This is helpful when making your deposits to the bank. A sample report is shown.

ABC Company

Customers - Addl Leaves

Report as of 1/1/2009 to 12/31/2009 For all payments collected within the period

Account	Code	Description	Qty	Price	Sub No	Tax	Date	Check No	Invoice No
Able, Andy	3	Payment - Thank	1.00	91.00	91.00		03/16/2009	0	0
Able, Andy	3	Payment - Thank	1.00	500.00	500.00		04/07/2009	0	0
Able, Andy	3	Payment - Thank	1.00	537.41	537.41		06/28/2009	0	0
Able, Andy	3	Payment - Thank	1.00	10.00	10.00		10/18/2009	0	0
Able, Andy	3		1.00	4500.00	4500.00		12/03/2009	0	0
Ainsworth, Sally	3	Payment - Thank	1.00	149.80	149.80		01/31/2009	1015	0
Ainsworth, Sally	3		1.00	8000.00	8000.00		12/03/2009	0	0
Anderson Ken & Emma	3	Payment - Thank	1.00	676.13	676.13		01/23/2009	4906	0
Anderson Ken & Emma	3		1.00	11000.00	11000.00		12/03/2009	0	0
Andriod, Sam	3	Payment - Thank	1.00	133.75	133.75		11/10/2009	0	0
Andriod, Sam	3		1.00	1200.00	1200.00		12/03/2009	0	0
Apple Bakery	3	Payment - Thank	1.00	120.00	120.00		04/07/2009	22	0
Apple Bakery	3	Payment - Thank	1.00	100.00	100.00		05/01/2009	232	0
Apple Bakery	3	Payment - Thank	1.00	200.00	200.00		12/22/2009	0	0
Auguston, Stuart & D	3	Payment - Thank	1.00	1500.00	1500.00		01/17/2009	20105926	0
Auguston, Stuart & D	3	Check No.121	1.00	14720.00	14720.00		12/03/2009	121	0
Barnstock, Ron & Sue	3	Payment - Thank	1.00	1375.77	1375.77		01/30/2009	5069	0
Barnstock, Ron & Sue	3	Check No.121	1.00	7090.00	7090.00		12/03/2009	121	0
Bear, Mr & Mrs	3	Check No.121	1.00	2500.00	2500.00		12/03/2009	121	0
Bendian, Ron & Sue	3	Payment - Thank	1.00	737.45	737.45		01/15/2009	1400	0
Bigwig, Leon	3	Check No.121	1.00	900.00	900.00		12/03/2009	121	0
Total Items Found	21	GRAND TOTAL		56041.31	*****				

Reports – Work Completed

[VIDEO – Reports – Work Completed Report](#)

[VIDEO – Reports – Print Transaction File Report](#)

This function lists all work completed within a period. Payments are not listed. Search for all or a selected code

ABC Company				Customers - Addl Leaves					
Report as of 1/1/2009 to 12/31/2009 For all work completed within the period									
Account	Code	Description	Qty	Price	Sub No	Tax	Date	Check No	Invoice No
Anderson Ken & Emma	6	Weekly Maintena	1.00	72.00	72.00		02/28/2009	0	0
Anderson Ken & Emma	17	Fertilizer App.	1.00	34.00	34.00		04/04/2009	0	16229
Anderson Ken & Emma	15	Fertilizer App.	1.00	33.00	33.00		04/09/2009	0	16229
Anderson Ken & Emma	7	Monthly Mainten	1.00	88.00	88.00		04/09/2009	0	16229
Anderson Ken & Emma	8	Spring Clean-Up	1.00	99.00	99.00		04/09/2009	0	16229
Anderson Ken & Emma	6	Weekly Maintena	1.00	72.00	72.00		04/14/2009	0	26239
Anderson Ken & Emma	6	Weekly Maintena	1.00	88.00	88.00		04/14/2009	0	10003
Anderson Ken & Emma	6	Weekly Maintena	1.00	72.00	72.00		09/17/2009	0	0
Anderson Ken & Emma	6	Service Call	1.00	576.00	576.00		11/09/2009	0	0
Anderson Ken & Emma	8	Service Call	1.00	978.00	978.00		11/09/2009	0	0
Anderson Ken & Emma	6	Service Call	1.00	576.00	576.00		11/27/2009	0	0
Anderson Ken & Emma	7	Monthly Service	1.00	631.90	631.90		11/27/2009	0	0
Anderson Ken & Emma	8	Service Call	1.00	978.00	978.00		11/27/2009	0	0
Anderson Ken & Emma	6	Service Call	1.00	576.00	576.00		11/27/2009	0	0
Anderson Ken & Emma	7	Monthly Service	1.00	631.90	631.90		11/27/2009	0	0
Anderson Ken & Emma	8	Service Call	1.00	978.00	978.00		11/27/2009	0	0
Anderson Ken & Emma	6	Service Call	1.00	576.00	576.00		11/27/2009	0	0
Anderson Ken & Emma	7	Monthly Service	1.00	631.90	631.90		11/27/2009	0	0
Anderson Ken & Emma	6	Service Call	1.00	576.00	576.00		11/28/2009	0	0
Anderson Ken & Emma	7	Monthly Service	1.00	631.90	631.90		11/28/2009	0	0

Report – Company Totals

VIDEO – Reports – Company Totals

This report totals charges and payments collected. This report shows taxes charged and collected for any period requested.

ABC Company

Report as of 1/1/2009 to 12/31/2009

For Account: ALL ACCOUNTS

Taxes Charged							Taxes Collected						
	Bill Charged	Taxable Amount	NJ	ROC	OR		Total Charged	Collected Without Tax	NJ	ROC	OR		Total Collected
Jan	7626.93	6752.33	456.14	19.77	0.00	0.00	8102.84	41351.79	2881.47	15.77	0.00	0.00	44249.03
Feb	1316.60	1007.00	31.57	46.57	0.00	0.00	1394.74	0.00	0.00	0.00	0.00	0.00	0.00
Mar	12159.82	12103.82	810.80	43.64	0.00	0.00	13014.26	91.00	0.00	0.00	0.00	0.00	91.00
Apr	3800.00	3467.00	132.51	131.82	0.00	0.00	4064.33	744.73	0.00	9.27	0.00	0.00	754.00
May	6338.20	6338.20	351.77	109.95	0.00	0.00	6799.92	92.27	0.00	7.73	0.00	0.00	100.00
Jun	8944.10	7804.10	529.77	19.77	0.00	0.00	9493.64	537.41	0.00	0.00	0.00	0.00	537.41
Jul	136.00	136.00	0.00	11.39	0.00	0.00	147.39	0.00	0.00	0.00	0.00	0.00	0.00
Aug	848.50	748.50	42.88	11.39	0.00	0.00	902.77	0.00	0.00	0.00	0.00	0.00	0.00
Sep	480.00	136.00	0.00	11.39	0.00	0.00	491.39	0.00	0.00	0.00	0.00	0.00	0.00
Oct	778.00	667.00	18.20	34.09	0.00	0.00	830.29	10.00	0.00	0.00	0.00	0.00	10.00
Nov	36355.90	26841.90	1811.58	263.13	0.00	0.00	38430.61	260.00	18.20	0.00	0.00	0.00	278.20
Dec	21208.88	19224.88	1259.86	156.71	0.00	0.00	22625.45	100462.45	24.43	15.46	0.00	0.00	100502.34
	Bill Charged	Taxable Amount					Total Charged	Collected Without Tax					Total Collected
AVG	8332.74	7102.23	453.76	71.64	0.00	0.00	8858.14	11962.47	243.68	4.02	0.00	0.00	12210.17
TOTAL	99992.93	85226.73	5445.08	859.62	0.00	0.00	106297.63	143549.65	2924.10	48.23	0.00	0.00	146521.98

Reports – Name and Address

VIDEO – Reports – Name and Address

ABC Company		Name and Address Report				
Menu Name	Address	City, State, Zip	Phone 1	Phone 2	Phone 3	
1. Able, Andy	68 New County Road	Monsey,NY 10952	745-348-4888			
2. Ainsworth, Sally	370 Martom Rd.	Wycoff,NJ 07481	241-485-8025	--	--	
3. Anderson Ken & Emma	778 Sun Valley Rd.	Ramsey,NJ 07446	241-934-0290	--	--	
4. Andrew, Jackson	4787 Oak Street	Mahwah,NJ 07430	241-236-9149	222-222-2222	--	
5. Andriod, Sam	133 Winslow Terrace	glen rock,NJ 07452	241-934-5569	--	--	
6. Antwar, Carl & Leeann	536 Concord Place	Wycoff,NJ 07481	234-891-0229	--		201-376-2789
7. Apple Bakery	100 Grannysmith Lane	Monsey,NY 10952	745-223-1212	201-835-4755		
8. Augusto, Carl & Sue	1 Trotters Lane	Mahwah,NJ 07430	276-529-5653	--	--	
9. Auguston, Stuart & Do	8 James Brite Circle	Mahwah,NJ 07430	241-327-4624	--	--	
10. Babridge Joan	224 Sparrowbush Rd	Mahwah,NJ 07430	271-825-4035	732-786-8330	--	
11. Barnstock, Ron & Sue	776 Lehmann St.	Mahwah,NJ 07430	267-848-0478	201-261-7100	--	
12. Baron, Alan & Sue	46 Glencarl Rd.	glen rock,NJ 07452	281-962-2736	261-818-2828	--	
13. Bear, Mr & Mrs	95 Tam-O-Shanter Drive	Mahwah,NJ 07430	221-529-5196	--	--	
14. Becker, Alan & Irene	34 North Bayard Ln.	Mahwah,NJ 07430	281-327-6132	--	--	
15. Bendian, Ron & Sue	99 Kiersted Place	Mahwah,NJ 07430	291-236-3608	201-666-8185	201-314-8605	
16. Berger George & Sarah	17 Surrey Lane	Mahwah,NJ 07430	251-818-2716	--	--	
17. Bigwig, Leon	101 Tam-O-Shanter Drive	Mahwah,NJ 07430	241-252-2733	201-261-0715	--	
18. Boldman Sam & Sally	38 Summer Drive	Mahwah,NJ 07430	271-512-0013	--	--	
19. Bossner, Jim & Michel	3 Acorn Ct.	Ramsey,NJ 07446	281-818-4865	212-743-6669	347-776-0989	
20. Bottle King	100 Street	Monsey,NY 10952				
21. Bresner Joe & Anne	30 North Bayard Lane	Mahwah,NJ 07430	201-825-1078	--	--	
22. Butler, Harry & Sally	5 Orchard Circle	Suffern,NY 10901	845-357-4643	--	--	
23. Butter Kirk & Jody	21 Feller Ct	Suffern,NY 10901	845-368-3357	--	--	
24. Cambell, Bernard & Ma	28 Riverside Drive	Suffern,NY 10901	845-357-5965	--	--	
25. Carson Thomas & Linda	14 Fieldstone Court	Mahwah,NJ 07430	201-818-4658	201-967-6323	201-819-9576	
26. Chadwick Lionel & Hel	1 Vail Place	Mahwah,NJ 07430	201-934-6974	--	--	
27. Cinco Lou & Janet	17 Snow Drive	Mahwah,NJ 07430	201-512-8871	--	--	
28. Clarke Alan & Angela	56 Anona Drive	Upper Saddle River,NJ 074	201-825-8108	--	--	
29. Collier, Jim & Sally	60 Bedford Place	Ramsey,NJ 07446	201-327-4880	--	--	
30. Collins, Mike	13 Riverside Drive	Suffern,NY 10901	845-357-3764	--	--	
31. Cowfield, Kelly	25 Surrey Lane	Mahwah,NJ 07430	201-825-4660	--	--	
32. Crow, Brian & Annie	11 Crocker Mansion Rd.	Mahwah,NJ 07430	201-236-9366	--	--	
33. Darmiento, Tony & Mar	100 Pittis Ave.	Allendale,NJ 07401	201-818-4074	201-934-3618	--	
34. Davis Michael & Joan	1 Pierson Ct.	Mahwah,NJ 07430	201-818-0333	--	--	

Calendar

VIDEO – Calendar Scheduling

Calendar

Search Clear Search Prt Month Cal **Prt Appts** Prt Route Prt Name Addr Config/Setup Export Import Refresh Schd ☐ Horz or Vert

1 5 7 31 15 50 Time Scale Captions (All) Show All Dates

☒ Jimmy
☒ Glen
☒ Jamie
☒ Inbox

Right Click on Day to Schedule Appointment

- Schedule Appointment
- New All Day Event
- New Recurring Appointment
- New Recurring Event
- Go to Today
- Go to Date...
- Change View To

March 2015

S	M	T	W	T	F	S
22	23	24	25	26	27	28
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April 2015

S	M	T	W	T	F	S
	1	2	3	4		
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

May 2015

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June 2015

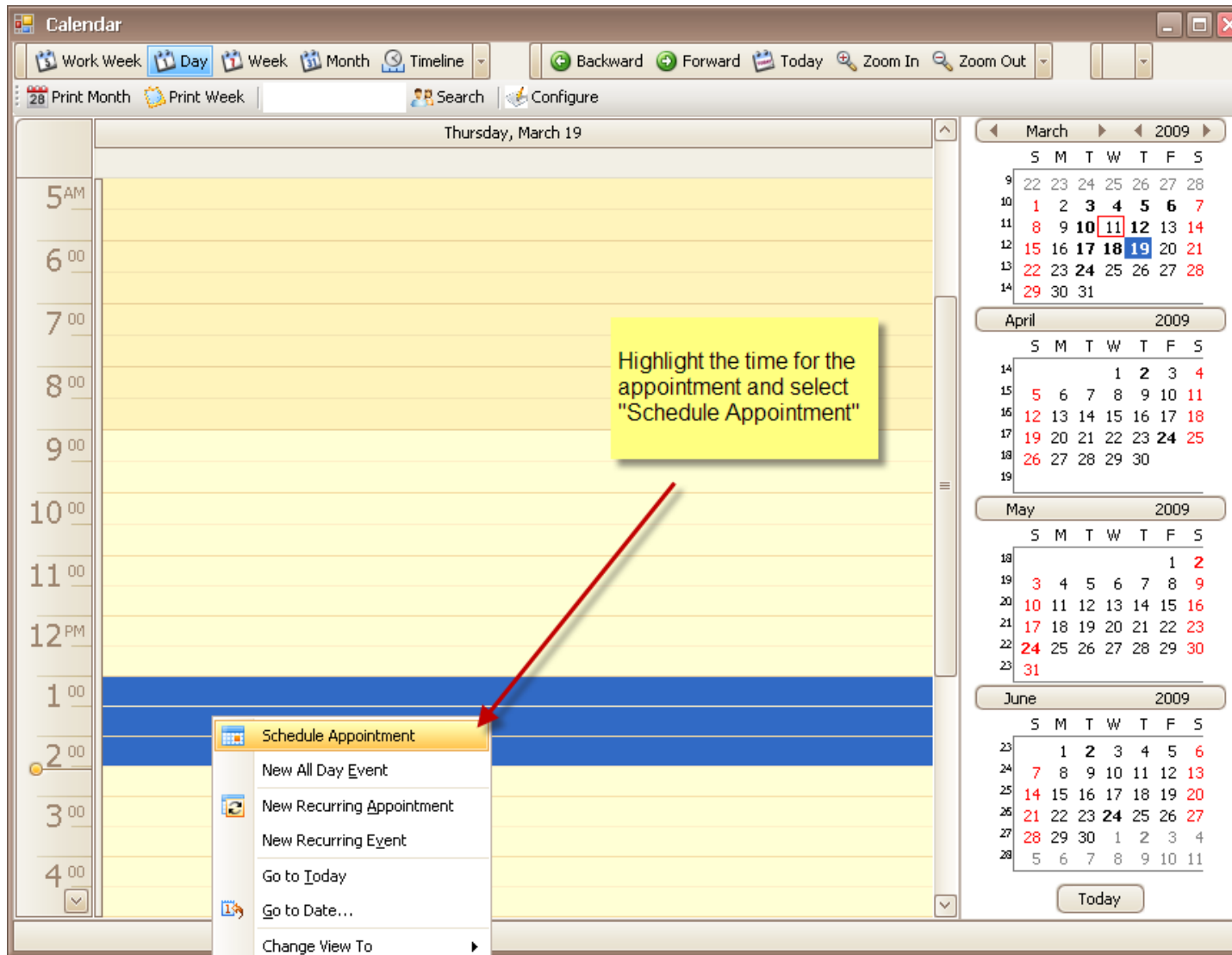
S	M	T	W	T	F	S
23						
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

July 2015

S	M	T	W	T	F	S
27						
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Today

Calendar – Making an Appointment



Calendar – Entering Appointment Info

Update Appt

Cancel

Acct Review

Std Ch

Transact

Job Desc

Tech List

Appointment

Select Route

Standard Charges

Phone Numbers

Appointment Record

Tech / Worker

Glen

Subject

Monthly Service [Abby Stevenson:HOME:111]

Frequency Default

Location

152 Robin Rd. |Georgetown

☒ Add Phone Number to Name

Customer

Abby Stevenson

Select Customer

1 - Job / Task

Monthly Service

Load Default Task

Clear Task

2 - Job / Task

Clear Task

3 - Job / Task

Clear Task

4 - Job / Task

Clear Task

5 - Job / Task

Clear Task

Notes

Start:

4/1/2015

10:00:00 AM

End:

4/1/2015

10:30:00 AM

Create New Customer

Status:

☒ Busy

☐ All day event

Label:

☐ None

☐ Reminder

Account schedule for Year

Drag a column header here to group by that column

Code	Description
1	Pest Inspection, NC
3	Payment - Thank You
6	Weekly Maintenance
7	Monthly Service
100	Animal Trapping
100	New Description Here
101	Animal Trapping - Additional Animal
102	Animal Trapping - Ck. Trap Rebait
103	Animal Trapping - Check Trap and remove.
104	Bird Trapping and exclusion
105	Ants First Treat
106	Ants First Follow up
107	Ants - Third Treat
108	Auto Repair
109	Bird mites
110	Bed Bugs - First Treat
111	Bed Bugs - 2nd treatment
112	Bed Bugs - 3rd Treatment
113	Camel Crickets
113	Bi Monthly Int Ext
114	Bed Bug Inspection Estimate

Record 4 of 98

☒ (Company ID) AND (Company ID)

Edit Filter

Calendar / Schedule – View as Grid

Select from the Estimate / More Menu, select Schedule. The schedule is displayed in a grid format as shown below. You can search on top of any column.

Schedule Appointment

CANCEL (EXIT)

Cancel (Exit)

ACCOUNT / SETUP

PRINT / APPT FUNC

Print Ticket
Print Route
Delete Appointment
Delete ALL Apptm...
Print Active Grid
Print Skipped Grid

Calendar

April 2015

S M T W T F S

29 30 31 1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 1 2

3 4 5 6 7 8 9

Today

28

ALL

Start Dt 4/12/2015

End Dt 4/25/2015

Appointment Details

Find Nearest Routes Day Schedule Service History Other / Batch Assignment Configuration Load Skipped

Customer Sierra Farms

Job / Service 1 Quarterly

Job / Service 2

Street 5582 Mt. Horeb Pike

City Lexington

Technician Glen

Start 4/13/2015 9:00:00 AM

Duration (Min) 60 10:00:00 AM

Notes

HOME 111-222-3333 Price 250.00 Frequency Quarterly

Select Customer

Create New Customer

Create New Appointment

Reload Job Location

Reschedule / Update Appointment

Create New Appointment for Existing Customer

List Appointments for customer

Change next occurrence date

Active Skipped Distance

	Date	Time	Customer	Location	City	Service	Tech	Route	Notes	Trans Status	Status
▶1	04-13-2015	09:00 AM	Sierra Farms	5582 Mt. Horeb Pike	Lexington	Quarterly	Glen			Not in Trans ...	None
2	04-13-2015	09:00 AM	Brenda Slone	304 E. Main St.	Millersburg	Monthly Service Int./...	Glen			Not in Trans ...	None
3	04-13-2015	10:30 AM	Camella Runyon	111 Olympia Way	Georgetown	Monthly Service Exterior	Glen			Not in Trans ...	None
4	04-13-2015	11:30 AM	Gwen Nakajima 001	199 Williamsburg Ln.	Georgetown	Monthly Service Int./...	Glen			Not in Trans ...	None
5	04-13-2015	12:30 PM	Gwen Nakajima 002	201 Williamsburg Lane	Georgetown, KY. 4...	Monthly Service Int./...	Glen			Not in Trans ...	None
6	04-13-2015	04:00 PM	Jay & Betty Blaine	215 Copperfield	Georgetown, KY. 4...	Quarterly	Glen			Not in Trans ...	None
7	04-13-2015	05:00 PM	Dragomier Nikdic	108 Rolling Ridge Rd.	Stamping Ground	Quarterly	Glen			Not in Trans ...	None
8	04-14-2015	09:00 AM	Stewart Smith 001	2404 Frankfort Rd.	Georgetown	Monthly Service Int./...	Glen			Not in Trans ...	None
9	04-14-2015	10:00 AM	Jeff Hollon	117 Rabbit Run Rd.	Georgetown	Quarterly	Glen			Not in Trans ...	None
10	04-14-2015	10:00 AM	Kristin Schuman	104 Amen Corner Way	Georgetown	Monthly Service Int./...	Jimmy			Not in Trans ...	None
11	04-14-2015	10:00 AM	(Sharon) Shar Golding	100 Falcon Ct.	Georgetown	Quarterly	Glen			Not in Trans ...	None
12	04-14-2015	10:00 AM	Scott County Ameri...	220 Connector Rd.	Georgetown	Monthly Service Int. ...	Glen			Not in Trans ...	None

Record 1 of 80

System Configuration

See the Configuration menu, Then System, Then Database Settings
The database Backup time is set here.

System Configuration

OK Exit

Backup and Restore

(Note: Do not have spaces in the path name)

Backup Path: C:/bm/bm_backup_DinardiTest

Backup Path 2: c:\bm\backup\billmaster_backup2

Daily Backup Time: 12 0 PM

Restore Path: C:/bm/backup/DNE.sql

Restore Database: billmaster

Restore Image DB: c:\bm\backup\billmaster_backup

CD Drive

Select drive letter to
for CD backups

CD Drive: E

☐ Skip 2nd Backup ☐ Backup as Zip File Only

☒ Skip Image Backup ☐ Backup with Zip File

☒ Skip Archive Backup ☒ Use Command Line Version

Database

Server Type: MySQL MySQL Version: 5.0

Server: localhost

Database: billmaster

User: root

Password: *****

MySQL Path: C://Program Files//MySQL//
eg. C://Program Files (x86)//MySQL//

Startup Views

Startup

Default Hard Drive: C:

Support Review: NO

Registration Code: *****

Call Monitoring

Caller ID Server PC?: NO

Look for S=Start E=End: S

Main Menu Screen Style: NO

Server / Remote: SERVER

Sales Tax Setup

Sales tax setup is shown below. If you have more than one sales tax area, you must setup a tax code for each area. When you create an account in a company you assign the account the sales tax code for his area. Example Codes NY, NJ, etc. BILLMASTER will tax charges made during the time period with the sales tax for that area.

Sales Tax Configuration

OK Exit

Drag a column header here to group by that column

Code	Percentage	Description	Start Date	End Date	State	Multiply By
NJ	0.07000	NJ	01-01-1753	12-31-9999		PRICE

Enter up to 3 characters to represent the sales tax area

Example
New York = NY
Suffolk - SUF

The sales tax percentage in decimal format examples

6% = 0.06
6 1/4 % = 0.0625

Only change the dates if the sales tax changes then enter the new start and ending dates.

Record 2 of 2

(Company ID)

Edit Filter

Zip Codes

As you enter your accounts, their zip codes will be saved and used as needed automatically.

Zip Codes

OK

Cancel

Delete All Rows Select

Select All Rows

Convert City to Mixed Case

Fill County Code

Drag a column header here to group by that column

	City	State	Zip	Zone	Map Coordinate	County Code
▶	Georgetown	KY	40324			
	Allen	KY	41601			
	Ann Arbor	MI	48105			
	Bardstown	KY	40004			
	Belleville	IL	62221			
	Belton	TX	76513			
	Berea	KY	40403			
	Betsy Layne	KY	41605			
	Burgin	KY	40310			
	Cambellsville	KY	42718			
	Carlisle	KY	40311			
	Carrollton	KY	41008			
	Catlettsburg	KY	41129			
	Chandler	AZ	85225			
	Charlotte	NC	28262			

Record 1 of 119

⏮

⏪

⏩

⏭

+

-

⏴

✓

✕

⏴

Configuration

General Setup

The General Setup configuration control how accounts are displayed on the main menu.
The Button is located in the center of the screen on the main menu.

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | **Company / Setup** | Descriptions | Estimates | Email / More / Other | Reports | Routes | Trans / Pymts | Util / Help

Company: **General Setup** | Sales Tax | Users | System Setup / Ribbon Layout | Acct Grp Def | Click below to scan

Company Address | Grid 1 Setup | Copy Sales Tax Table | Workers / Technicians | Screen Style Selection | BMOTG - Setup

Copy Company Address to Another Company | Grid 2 Setup | Zip Codes | Sales Tax & Zip Codes | Users / Technicians | System & Screen Setup | Groups

Quick Pick: | Route: | ☐ Inactive | ☒ Excel | ☐ Dash | ☐ Calc | ☐ SndTst | ☐ Refresh Bal | ☐ Clear 1 | ☐ Select All | ☐ Clear 2 | ☐ Range | ☐ Review | ☐ Prt Rte Cal | ☐ Del Rng | ☐ Excel 2

	Menu Name	Group 1	Balance	Phone 1	Street	City
1	(Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2	Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3	Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4	Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5	Alan Rich		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6	Alan Slusher				Woods	Nicholasville
7	Albert Plunkett				Trail	Georgetown
8	Alex Davenport					
9	Alicia House				ugh	Georgetown
10	Allison Briggs				ld Dr.	Georgetown
11	Ally & Jeremy Barnett				n Woods Rd.	Lexington
12	Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13	Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14	Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15	Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16	Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17	Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18	Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19	Amy Barron		0.00	111-222-3333	102 Summeridge Way	Georgetown
20	Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown

General Setup

Menu Name: Ally & Jeremy Barnett

General Setup – Continued

General Settings

OK Exit System Key and Color Settings BILLMASTER - On The Go General PW Admin 01 PW Expense PW Reports PW Grid 1 Custom Field Configuration E-mail Setup Calendar Setup

General Main Menu Layout Quick System Key and Color Settings Company Charts / Graphs Grid 2 Settings System Administration Job Descriptions

Grid Filters and Options

☒ Round up Sales Tax 4th dec point
☐ Round up Sales Tax 3rd Dec point
☐ Multiple Users (running on Network)
☐ Disable Auto Size Grid Columns

Search Found Limit: 1000

☒ Check for duplicate on Range Selection
☒ Internet Connection Active
☒ Position from Last Selection
☐ Check for Duplicate Standard Charges

☒ Show Only Accounts Found from Search Box
☐ Include Customer No. in Search
☒ Auto Refresh Balance
☒ Auto Refresh Balance Grid 1
☐ Display Account with Alert Setting as BOLD
☐ Display Account with Bulk Setting as BOLD
☐ Display Account Info Popup on Start up
☐ Remove Acct. from Selected List after Payment
☐ Display Account with Private Notes as BOLD

Default Job Desc Filter

Grid 1 Custom Flds

☐ Enable Customer Fields on Grid 1

Standard Charges Display

Default shows price
☐ Display "X" for items with price
☐ Display "Z" for items w/ Zero price
☐ Display A=Active, D=Done
☐ Display as JAN1, FEB1, etc
 Enter year below for checking if a service is done. Example : 2012

Restart Billmaster after changing these settings

Max Users: 5

☒ Use MEM Customers
☒ Use MEM Transactions
☒ Use MEM Job Desc
☒ Use MEM Tax Table

Search Increment

Standard Charges: 100

Startup Options

☐ Check Job Desc Internal Numbering
☐ Start Internet Browser on Startup
☐ Default to Fast Info Tab

☐ Auto Charge Per Month
☐ Enable Auto Charging

☐ Enable POS
☐ Auto Sync Balances

☐ Update Balance Loan Amount Remaining
☐ Display Appointments on Startup
☐ Load Account Info (Slow Startup)

Expiration Checks

☐ Check Credit Card Expiration
☐ Tax Exempt Certificate

Number of days prior to check:
 Date last time checked:

Default Appointment View: 4 - Current Week
 Excel export type:

Loop Limit for Standard Charge display update - Note Must be more to display values.

Check this box if you are running BILLMASTER on more than one computer.

Security

BILLMASTER gives you the ability to setup several levels of security.

Examples:

- Entry into the BILLMASTER program
- Entry into a Line of Business
- Entry into the Report Section.
- Entry into Configuration Settings
- Entry into the Expense Section.

To setup security go to General Setup and select the area you want to secure.

The screenshot shows the 'General Settings' window with several tabs: 'OK', 'Exit', 'System Key and Color Settings', 'General PW', 'Admin 01 PW', 'Expense PW', and 'Reports PW'. The 'General PW' tab is active, displaying various security and display options. A yellow callout box with the text 'Select the area you want to secure with a password.' has four red arrows pointing to the 'General PW', 'Admin 01 PW', 'Expense PW', and 'Reports PW' tabs.

Grid Filters and Options

- ☒ Round up Sales Tax
- ☐ Multiple Users (running on Network)
- ☐ Disable Auto Size Grid Columns
- Search Found Limit:
- ☒ Check for duplicate on Range Selection
- ☒ Internet Connection Active
- ☒ Show Only Accounts Found from Search Box
- ☒ Include Customer No. in Search
- ☒ Auto Refresh Balance
- ☐ Display Account with Alert
- ☐ Display Account Info Pop
- ☐ Start Internet Browser on

Select Items to display in the Quick Account Details

- ☒ A - Menu Name
- ☐ B - Balance
- ☒ C - Routes
- ☒ D - Phone Numbers
- ☒ F - Job Location 1
- ☒ G - Job Location 2
- ☒ H - Standard Charges
- ☐ I - Site Info
- ☒ J - Email
- ☐ K - Last Charge & Pymt

Grid 1 Select items to display in Grid 1 - Per Company

- ☒ A - Highlight accounts with No Routes in Orange
- ☒ B - Highlight accounts with Status Yellow
- ☒ C - Highlight accounts with Status Red
- ☒ D - Highlight accounts that are Inactive in Blue
- ☐ E - Upline Accounts that have individual proposals / estimates
- F - Custom Display Style:

Note: These settings are Per Company

Grid 2 Configuration

- ☒ A - Grid Active - Accepts Entries

Cheat Sheet Notes (Shown on Fast Info Tab)

```
!= one
$= Two
$more stuff
```

Grid Account Payment Status

Enter non Zero Amount that if greater than will be true, for payment status.

	30 days Open	60 days Open	90 days Open	120 days Open
Yellow - Late Payer	<input type="text" value="100"/>	<input type="text" value="100"/>	<input type="text" value="100"/>	<input type="text" value="100"/>
Red - Deliquent	<input type="text" value="500"/>	<input type="text" value="500"/>	<input type="text" value="500"/>	<input type="text" value="500"/>

Report Settings

- ☐ A - Disable Route Name on Balance / Aging Report
- ☒ B - Ask to show Charts when available
- C - Bar Chart Style:
- D - Pie Chart Style:

Proposals / Estimates

Create Estimate for Account

[VIDEO – Create General Estimate / Proposal](#)

[VIDEO – Contracts and Renewal Letters](#)

Select the customer for account review and press the Create Doc Button. Then press the Edit Doc button to write the estimate.

Apple Bakery

Fast Keys | Setup / Chemical / WDI / Other | Documents

Create Doc | Edit Doc | Print Doc | Tutorial | OFF LINE | Google Map

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Sit

Menu Name: Apple Bakery

Letter: 1 | Customer Code: 1015

Status: Green

Current Balance: 922.14

Bill To: Job Location

Bill to:

Company:

Personal: Mr. Johnny Appleseed

Street: 100 Grannysmith Lane

CSZ: Monsey

Phone Numbers

Home: 745-223-1212 | Ce.

Additional No.: 201-835-4755 | Ce.

Cell 1:

Create Docs

Docs

Name: Waterfall

Add Name

Move Up | Move Down | Delete | Rename

Name

Exit

Press the Create Doc Button, and enter the name describing the estimate you are creating. Then press Add Name

	Price	Type	T1
e	150.00	1	
	450.00	1	ROC
g	0.00	800	ROC
s @ \$40.00/MnHr	0.00	800	ROC
	0.00	700	ROC
gram - Yearly	0.00	700	ROC
#1	0.00	700	ROC
#2	0.00	1	ROC
ng - Stakes ...	0.00	1	

Notes | Delete from Route | Change Order

Customers - Snow Plowing

Apple Bakery

Fast Keys | Setup / Chemical / WDI / Other | Documents

Create Doc | Edit Doc | Print Doc | Tutorial | OFF LINE | Google Map

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info

Menu Name: Apple Bakery
 Letter: 1 | Customer Code: 1015
 Status: Green
 Current Balance: 922.14

Bill To: Job Location

Bill to:

Company:

Personal: Mr. Johnny Appleseed

Street: 100 Grannysmith Lane

CSZ: Monsey

Phone Numbers

Home: 745-223-1212 | Cell:

Additional No.: 201-835-4755 | Cell:

Cell 1:

Select Document for: Apple Bakery

OK Cancel Select Form Print Style

Name

Waterfall

Select your document to write the estimate.

Type	T1
150.00	1
450.00	1 ROC
0.00	800 ROC
@ \$40.00/MnHr	0.00 800 ROC
0.00	700 ROC
am - Yearly	0.00 700 ROC
#1	0.00 700 ROC
#2	0.00 1 ROC
- Stakes ...	0.00 1

Notes | Delete from Route | Change Order

Following

Docs: Waterfall

Save Print Cancel Pick Items Job Descriptions Print Control Setup

Document Body - Type your content below

Waterfall to be 15' x 10' facing the south side of the property.
 Stone surrounding the waterfall will be sloped up to 8' feet high.

Type your estimate and Save

Header

Footer

Apple Bakery

Fast Keys | Setup / Chemical / WDI / Other | Documents

Create Doc | Edit Doc | **Print Doc** | Tutorial | OFF LINE | Google Map

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info

Menu Name: Apple Bakery
 Letter: 1 | Customer Code: 1015 | Group / Type 1: RES
 Status: Green
 Current Balance: 922.14

☒ Apply Service Charge if needed?
☒ Charge Taxes?

Print Document

Customers Selected: 1 | Processing Status:
 8.5 x 11.0 - NEBS proposal style 1 | Document Form Style to Print: 1
☐ Run Report Designer when OK is pressed. | C:/bm/custom/docs/housePrint_001.repx

OK | Exit

Bill To: Job Location

Bill to:
 Company:
 Personal: Mr. Johnny Appleseed | House #
 Street: 100 Grannysmith Lane
 CSZ: Monsey | NY | 10952

Phone Numbers

Home: 745-223-1212 | Cell 2:
 Additional No.: 201-835-4755 | Cell 3:
 Cell 1:

Routes

Add to Route | Route Notes | Delete from Route | Change Order

Name:
 Customers - Snow Plowing

**Select Print Doc
Choose print style
and press OK.**

Item	Type	T1
12	Core Aeration	0.00
13	Fertilizer Program - Yearly	0.00
14	Fertilizer App. #1	0.00
15	Fertilizer App. #2	0.00
35	Driveway Staking - Stakes ...	0.00

ABC Company
126 Valley Road
Glen Rock, NJ 07452
(845)111-2222 Fax (845)333-4444

ESTIMATE

Mr. Johnny Appleseed
100 Grannysmith Lane
Monsey NY 10952

Phone 745-223-1212 Date 12/30/2009

Mr. Johnny Appleseed
100 Grannysmith Lane
Monsey NY 10952

Waterfall to be 15' x 10 facing the south side of the property.
Stone surrounding the waterfall will be sloped up to 8' Feet High.



We Propose herby to furnish material and labor- complete in accordance with the above specifications, for the sum of

12 500

All material is guaranteed to be as specified. All work to be completed in a professional manner according to standard practices. Any alteration or deviation from above specifications involving extra costs will be executed only upon written orders, and will become an extra charge over and above the estimate. All agreements contingent upon strikes, accidents or delays beyond our control. Owner to carry fire, tomado, and other necessary insurance. Our workers are fully covered by Workers Compensation Insurance.

Authorized
Signature

Print Name
Here

Note: This proposal may be withdrawn by us if not accepted within 30 days.

Expenses

Expenses

General Instructions:

BILLMASTER tracks your expenses with automatic balance calculation, profit and loss reports, checkbook reconciliation etc. Check with your accountant for any questions about the deductibility of expenses and accounts receivable.

Organization - Your expenses are tracked and organized in a checkbook style. You can enter in expenses in a variety of ways.

Style 1 - As a checkbook. All expenses and deposits are entered into one file. This file is called a checkbook or ledger. This provides a simple way to have the balance of your checkbook calculated.

For example: Repairs, Utilities, etc. would be the name of ledger column. Charges would be entered into each column for money owed to that supplier. As the payments are made to the suppliers they are entered into the column to balance the ledger.

Deductible Expense

The expense must be incurred in a trade or business carried on by the taxpayer. Personal expenses are excluded. The expense must not be for permanent items (briefly defined a permanent item has a useful life of two or more years). Some permanent items can be depreciated. Check with your accountant. The expense must be "ordinary and necessary".

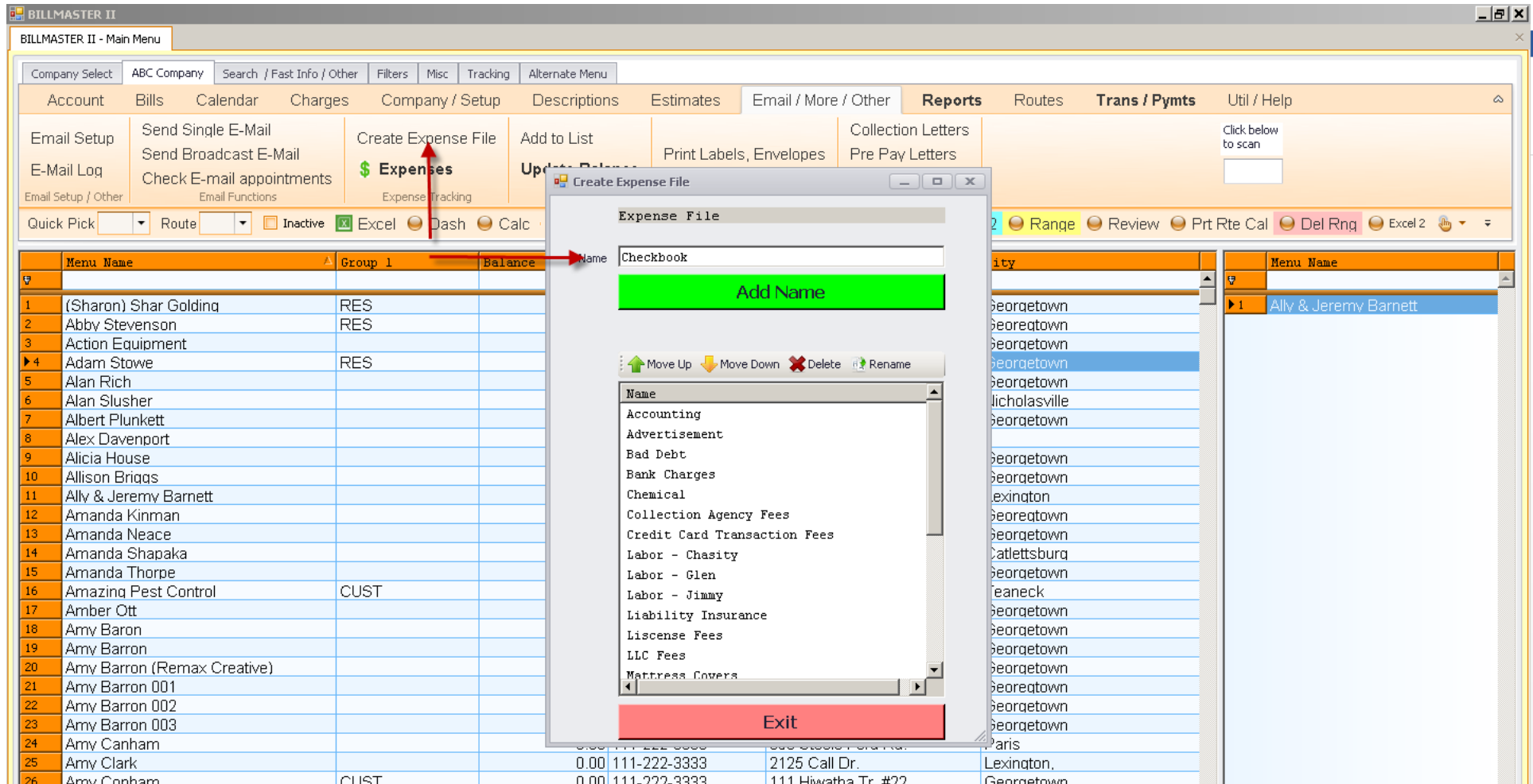
Accounts Receivable

No entries should be made for services rendered or merchandise sold ON ACCOUNT. Only CASH, when received, should be recorded. No income is considered earned until CASH is actually received. Not all CASH is income. Not all cash received is income. Only cash receipts from business or profession should be recorded. Be sure that you do not include non-taxable income such as: Cash received from bank as a loan. Cash deposited in business checking account from personal funds to cover overdrafts, etc. Cash received from employees in repayment of a loan. Cash received from life insurance or accident policies.

Each expense description code has a TYPE definition. The TYPE definition defines which of the four categories it is used for. The TYPE definition of a code is important. It defines how the expense will be added and totaled in reports.

Create Expense File

Select from the Estimates / More menu, Expenses to create an expense file. You can create one for each year if desired.



Entering Expenses

Select Expense from the Estimates / More menu or from the Fast Keys tab on the Main Menu, Select Expenses.

Expense File: 2009 Expenses

Fast Keys Configuration Hide Columns / Filter

Drag a column header here to group by that column

Expense Tracking

Code	Description	Qty	Amount	Balance	Date	△	Category	Check No.	Type	PO
3	Deposit	1	10000.00	10000.00	01/01/2009		Deposits	0	3	
10	Rent	1	-1300.00	8700.00	09/17/2009		Rent category	0	1	
11	Copy Paper	1	-44.00	8656.00	11/10/2009		Office Expenses	0	1	
50	Business Meal	1	-28.50	8656.00	11/10/2009		Meals and Ente...	0	900	
10	Rent	1	-1300.00	7356.00	12/07/2009		Rent category	0	1	
50	Business Meal	1	15.40	7356.00	12/14/2009		Meals and En...	0	900	
*										

Code for Expense

Balance is always shown

Expense Categories are supplied and can be modified

**Type determines how is it added
900 types, do not affect balance, but the expense is tracked.**

7342.90

Record 6 of 6

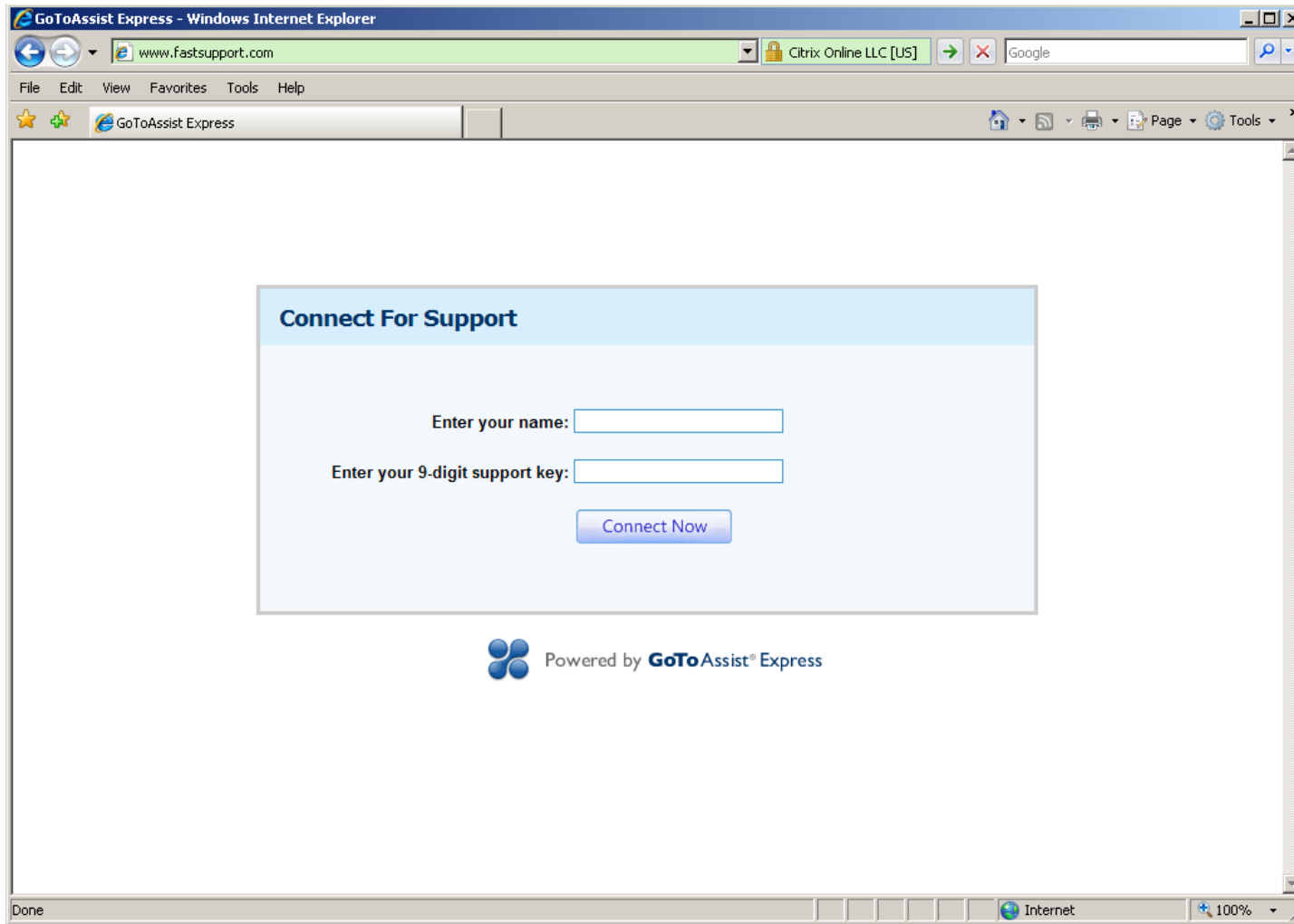
Support – Help

If you need support help please call us at 201-620-8566

A support representative will contact you. Provide a support link in the e-mail or be directed to go to the Website

www.fastsupport.com

and you will be given a 9 digit Support Key



Backup

The Backup setting are located from the Company / Setup Menu, then choose Backup / Database Settings

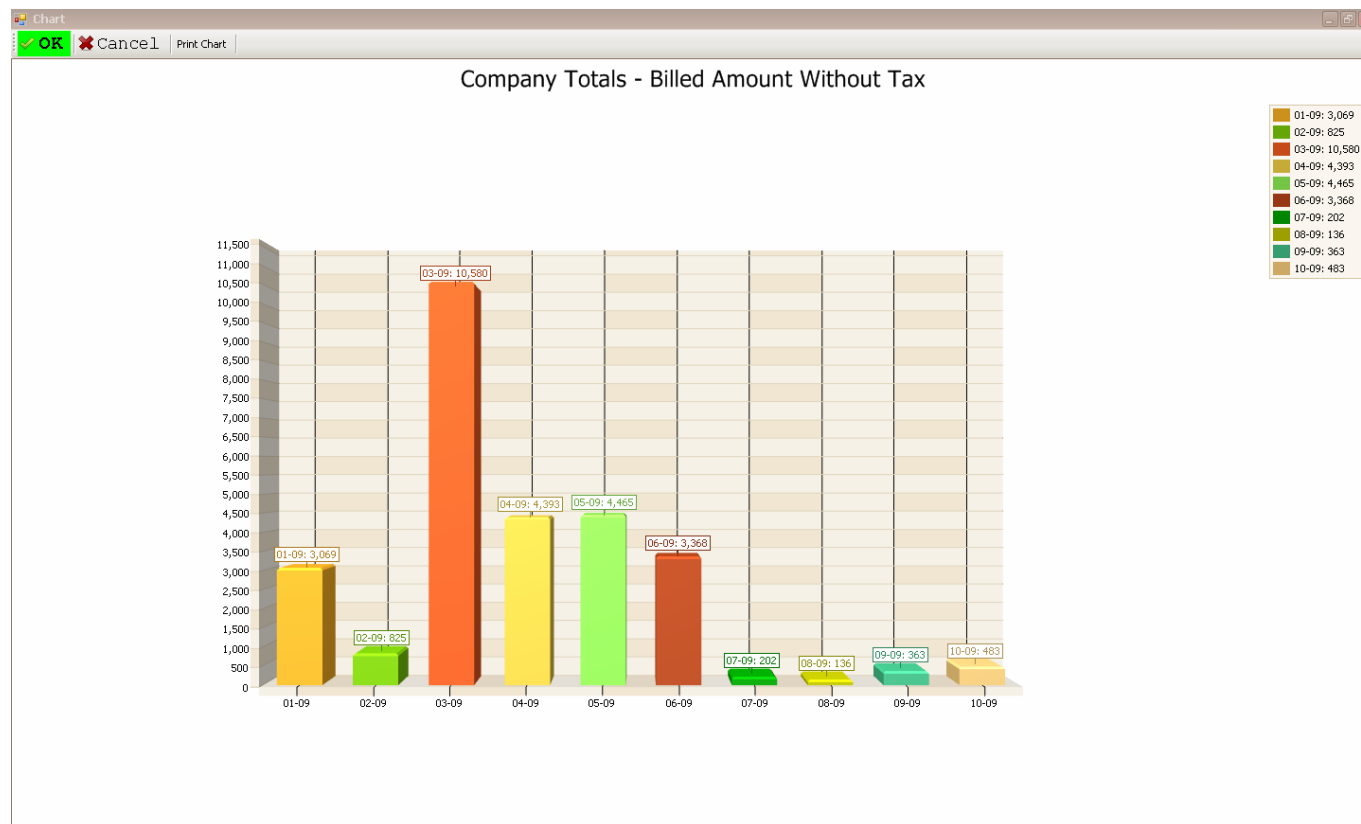
A second backup location is available. You can backup your data to two different locations at once.
See Company/Setup -> Backup / Database Settings

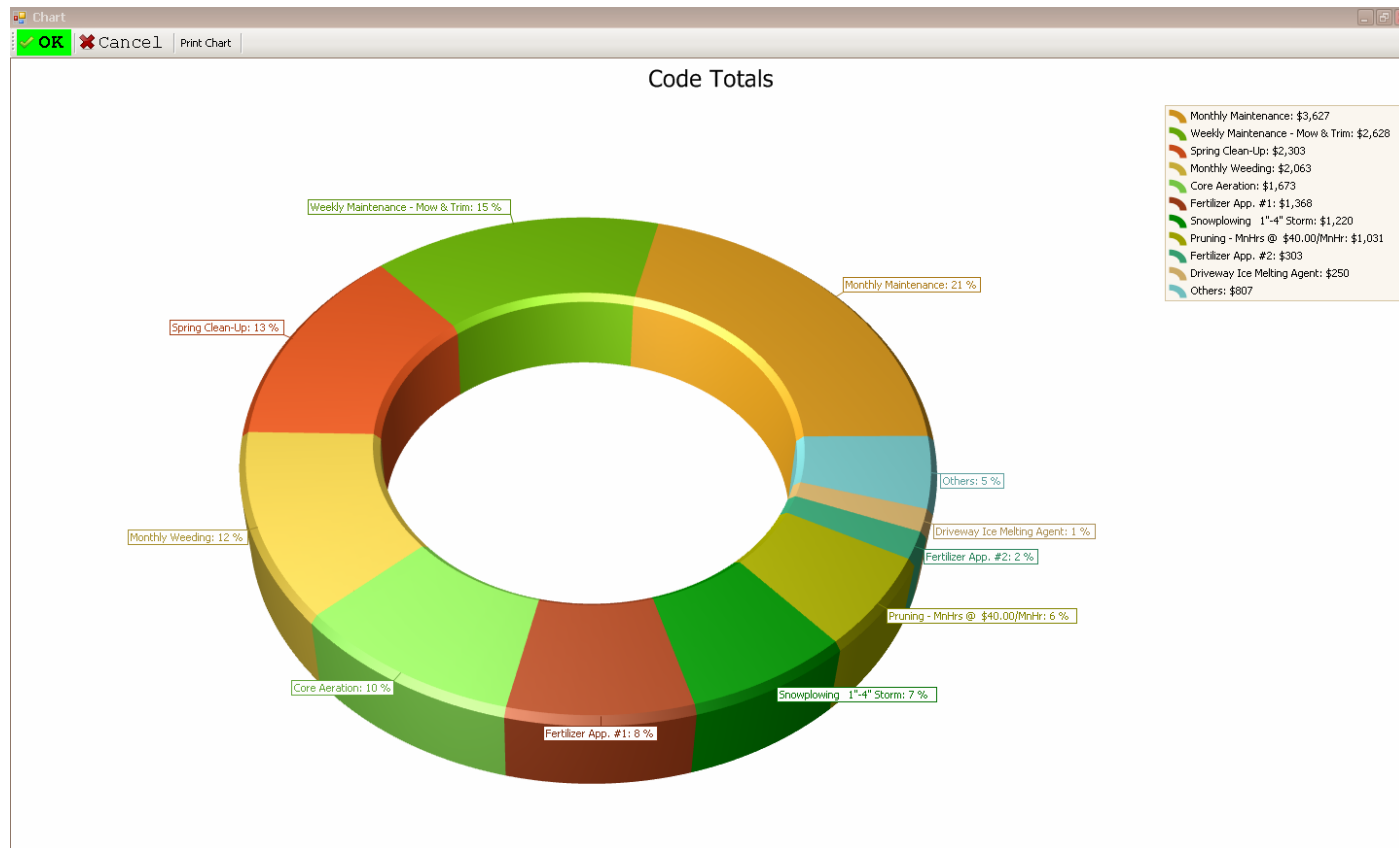
The screenshot shows the 'System Configuration' window with the following sections:

- Backup and Restore**
 - Backup Path: C:/bm/backup/bm_backup
 - Backup Path 2: c:\bm\backup\billmaster_backup2 (highlighted with a red arrow and labeled 'Second Backup Location')
 - Daily Backup Time: 9:33 AM
 - Restore Path: C:/bm/backup/Demo_01_2009_10_18_09_33_00
 - Restore Database: billmaster
- Databas Server Type**
 - Server: MySQL
 - Database: localhost
 - User: billmaster
 - Password: root
- CD Drive**
 - Select drive letter for CD backups
 - CD Drive: F
- Startup**
 - Default Hard Drive: c:
 - Support Review: NO
 - Monitoring Devices
 - Caller ID Server PC?: NO

Charts

Charts are now available for **Code Totals** and **Company Total** reports.
See Company/Setup -> Configuration/Setup -> General Setup. Check option B to activate.





Expense File – Default Fast Button

Now access the expense file with one button. Assign the expense file you wish to access directly, under Company/Setup -> Configuration Setup -> Expense

Set the expense file to access directly.

When you press the Expense button on the main menu you will directly edit this file.

The image shows a screenshot of the 'Expense Settings' dialog box. The dialog has a title bar with standard window controls and two buttons: 'OK' (with a green checkmark icon) and 'Exit' (with a red X icon). The main area is yellow and contains two sections:

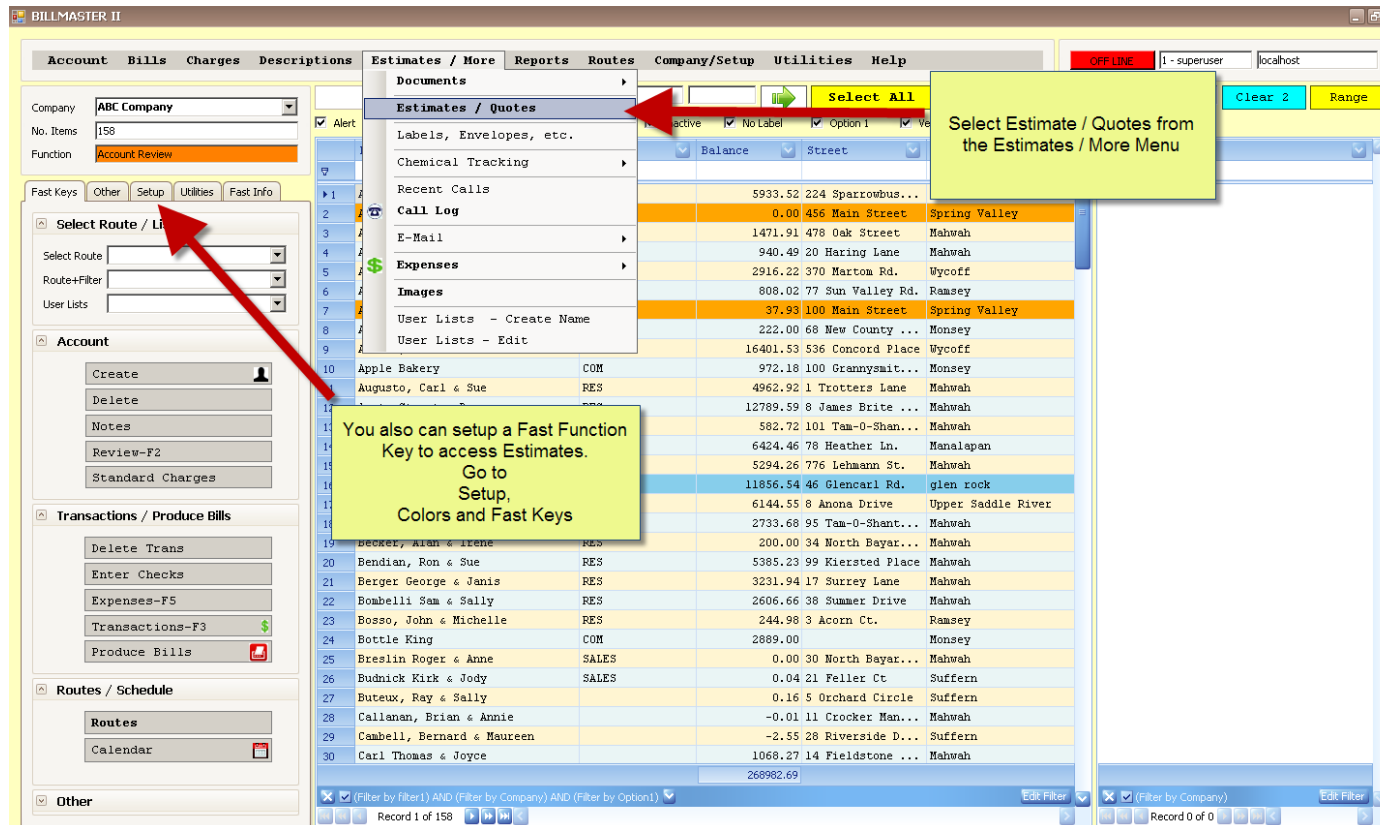
- Link payments to Expense File**: This section contains instructions to select an expense file for linking payments. It includes two buttons: 'Select Expense File to Link' (green) and 'Unlink Expense File' (pink). Below these buttons is an empty text input field.
- Fast Key Expense File Default**: This section contains instructions to select an expense file for direct access. It includes two buttons: 'Select Expense File to Link' (green) and 'Unlink Expense File' (pink). Below these buttons is a text input field containing the text '2009 Expenses'.

A white text box with a blue border is positioned to the right of the first section, containing the text: 'Select the Expense File to link to with a Fast Key Button'. A large red arrow points from this text box to the 'Fast Key Expense File Default' section.

Creating Estimates, Tracking Estimates

The estimate / quote creation and tracking function will allow you to create and tracking estimate easily.

Select from the Main Menu Choice “Estimates / More”, Then Estimates / Quotes



The Estimate name defaults to the estimate number. You can add an additional description as needed. Then select a customer who the estimate is for and enter in who created the estimate. Likewise you can enter the estimate total at this time if known.

Estimate Configuration

Configure the creating and printing of your Estimates by pressing the Estimate Configuration Button.

The screenshot shows the 'Estimate Tracker' application window. At the top, there are buttons for 'Save' (green), 'Select All Rows' (cyan), and 'Delete Selected Rows' (red). To the right, there are input fields for 'Estimate Name' (10035) and 'Customer', along with a 'Select Customer' button. Further right are buttons for 'Estimate Configuration', 'Transaction File', 'Add Estimate', 'Print Estimate', 'Copy to Transaction File', 'Print Grid', and 'Estimate Details'. A red arrow points from the 'Estimate Configuration' button to a yellow callout box labeled 'Estimate Configuration'.

Below the top bar is a search area with a 'Search Estimate Name' field and an 'Estimate Total' field. A yellow callout box labeled 'Press Add Estimate to create the estimate' has a red arrow pointing to the 'Add Estimate' button.

The main area contains a table with columns: Customer, No., Estimate Name, Labor, Tax, Material, Sub Total, Total, Accepted, Status, Submitted, Follow Up, Notes, and Created By. The table lists four estimates:

	Customer	No.	Estimate Name	Labor	Tax	Material	Sub Total	Total	Accepted	Status	Submitted	Follow Up	Notes	Created By
1	Ciocci Lou & Janet	10031	10031	12000.00		11000.00		33500.00	<input type="checkbox"/>	Creating	10/28/2009	11/4/2009	Large Renovation	Joe
2	Walsh John & Suzanne	10032	10032					1500.00	<input type="checkbox"/>	Submitted	11/1/2009	11/15/2009		Joe
3	Ainsworth, Sally	10033	10033					4500.00	<input type="checkbox"/>	Submitted	11/1/2009	11/15/2009		Joe
4	Ramirez Ken & Paula	10034	10034				1500.00	5500.00	<input type="checkbox"/>	Submitted	11/1/2009	11/15/2009		Joe

Below the table is a configuration panel with various settings:

- Default Create Status: Submitted
- Default Accepted Status: Accepted
- Days to add to Start For Follow up: 14
- Form Subtotal Label: Sub Total
- Form Sales Tax Label: Sales Tax
- Form Total Label: Total
- ☐ Print Bar Code on Estimate
- Column Display Selection:
 - ☐ Hide Labor Column
 - ☐ Hide Material Column
 - ☐ Hide Tax Column
 - ☐ Hide Created By Column
- Estimate Defaults per Company:
 - Default Estimate Creator Name: John

Annotations include:

- A yellow callout box labeled 'Labels used printing' with a red arrow pointing to the 'Form Subtotal Label', 'Form Sales Tax Label', and 'Form Total Label' fields.
- A yellow callout box labeled 'Estimate Configuration' with a red arrow pointing to the 'Estimate Configuration' button.
- A yellow callout box labeled 'You can hide unused columns on the estimate tracking screen' with a red arrow pointing to the 'Column Display Selection' checkboxes.

Estimate Details

Select a row by clicking on the left margin and double click to access account details or select Estimate Details. Select your items for the estimate. You can also type in any description , quantity and price free form.

Estimate Detail for 10034Customer: Ramirez Ken & Paula

Buttons: Save, Cancel, Search for Desc, Save Refresh

Left Panel (Item List):

Categ...	Code	Description	Price
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
	17	Fertilizer App. #4	0.00
	18	Fertilizer App. #5	0.00
	19	Fertilizer App. #6	0.00
	20	Lime Application	0.00
	21	Fungicide Sp. Application	0.00
	22	Soil Testing	0.00
	23	Leaf/Brush Removal yd(s) @ \$20.00/yd	0.00
	24	TYPE- Hort. Work Description	0.00
	25	Labor Hour @ Man Hours \$40.00/Mnhr	0.00
	26	Grass Seed/Labor @ \$3.00/lb	0.00
	27	Grass Seed Mulch/Labor @ \$1.00/lb	0.00
	28	Leaf Clean-Up @ Man Hours \$40.00/Mnhr	0.00
	29	Lawn/Landscape Maintenance - Monthly Total	0.00
	30	Snowplowing 1"-4" Storm	0.00
	31	Snowplowing 5"-8" Storm	0.00
	32	Snowplowing 9"-12" Storm	0.00
	33	Driveway Ice Melting Agent	0.00
	34	Walkway Ice Melting Agent	450.00
	35	Driveway Staking - Stakes @ \$3.75 ea.	1.00
	700	TYPE- Prints description, date no price	0.00
	800	TYPE- No Tax charged for item	0.00
	900	TYPE-Hidden Charge, only seen by you	0.00
	999	Previous Balance	0.00

Right Panel (Summary Table):

Code	Desc	Price	Sub Total	Date	Type	Tx Cdt	#
30	Lot Area	1.0000	154.00	11/1/2009	1		1
6	Weekly Maintenance	1.0000	56.00	11/1/2009	800		2
30	Residential - East Side	1.0000	90.00	11/1/2009	1		3
100	Any Description can be entered. No limit to the length that you can type. And enter price as	1.0000	950.00				4
200	Piping	5.0000	50.00				5

Callouts:

- Press Save when completed** (points to the Save button)
- Click on any row with the mouse to select a item, and it will be copied to the right.** (points to a row in the left panel)
- Codes can also be entered here, or just type in anything for the description. Adjust Quantity as needed. The sub total is show on the bottom.** (points to the right panel)
- Change the order of the items here if needed** (points to the right panel)

Bottom Summary:

9.0000	1300.00	1500.00
--------	---------	---------

Footer:

(Company ID) Record 37 of 37 (ID) Record 1 of 5

Estimate - Print

Select your estimate to print and press Print estimate. You can print your Estimate in ANY Format.

Style 1

ABC Company 573 Main Street Mahwah, NJ 07430 (845)111-2222 Fax (845)333-4444							
		Estimate					
Name / Address Mr&Mrs Ken Ramirez 149 Miller Rd. Mahwah NJ 07430		<table border="1"> <tr> <th>Date</th> <th>QUOTE #</th> </tr> <tr> <td>11/01/09</td> <td>10034</td> </tr> </table> Job Location Job Location: Mr&Mrs Ken Ramirez 149 Miller Rd. Mahwah NJ 07430		Date	QUOTE #	11/01/09	10034
Date	QUOTE #						
11/01/09	10034						

DESCRIPTION	QTY	PRICE	TOTAL				
Lot Area			154.00				
Weekly Maintenance			56.00				
Residential - East Side			90.00				
Any Description can be entered. No Limit to the length that you can type. And enter price as needed.			950.00				
Piping	5.00	50.00	250.00				
	Sub Total		1500.00				
	Sales Tax		0.00				
Note: This proposal may be withdrawn by us if not accepted within 30 days	Total		5500.00				

Style 2

ABC Company 573 Main Street Mahwah, NJ 07430 (845)111-2222 Fax (845)333-4444					
Estimate					
Name / Address Mr&Mrs Ken Ramirez 149 Miller Rd. Mahwah NJ 07430	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: center;">Date</th> <th style="text-align: center;">QUOTE #</th> </tr> <tr> <td style="text-align: center;">11/01/09</td> <td style="text-align: center;">10034</td> </tr> </table> Job Location Job Location: Mr&Mrs Ken Ramirez 149 Miller Rd. Mahwah NJ 07430	Date	QUOTE #	11/01/09	10034
Date	QUOTE #				
11/01/09	10034				

We hereby submit specifications and estimates for:					
Lot Area	154.00				
Weekly Maintenance	56.00				
Residential - East Side	90.00				
Any Description can be entered. No Limit to the length that you can type. And enter price as needed.	950.00				
Piping	5.00 50.00 250.00				
We Propose herby to furnish material and labor - complete in accordance with the above specifications, for the sum of \$ 5500.00					
Payment to be made as follows:					
All material is guaranteed to be as specified. All work to be completed in a professional manner according to standard practices. Any alteration of deviation from above specifications involving extra costs will be executed only upon written orders, and will become an extra charge over and above the estimate. All agreements contingent upon strikes, accidents or delays beyond our control. Owner to carry fire, tornado, and other necessary insurance. Our workers are fully covered by Worker's Compensation Insurance.	Authorized Signature _____ Print Name Here _____ Note: This proposal may be withdrawn by us if not accepted within 30 days				
Acceptance of Proposal					
The above prices, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made outlined above.					
Date of Acceptance: _____	Signature _____				

Estimate – Copy to Transaction File

You can copy your estimate details to the Transaction file by selecting the estimate and pressing Copy to Transaction file. You can also access the account transaction file by pressing Transaction File.

The screenshot shows the 'Estimate Tracker' window. At the top, there are buttons for 'Save', 'Select All Rows', and 'Delete Selected Rows'. Below these are input fields for 'Estimate Name' (10035), 'Customer', and 'Created By' (John). To the right are buttons for 'Select Customer', 'Add Estimate', 'Print Estimate', and 'Copy to Transaction File'. On the far right, there are buttons for 'Estimate Configuration', 'Transaction File', 'Print Grid', and 'Estimate Details'. Below the input fields is a table with columns: Customer, No., Estimate Name, Labor, Tax, Material, Sub Total, Submitted, Follow Up, Notes, and Created By. The table contains four rows of data. A yellow callout box with the text 'Select Copy to Transaction file when estimate is accepted.' has a red arrow pointing to the 'Copy to Transaction File' button. Another red arrow points to the 'Submitted' checkbox in the first row of the table.

	Customer	No.	Estimate Name	Labor	Tax	Material	Sub Total	Submitted	Follow Up	Notes	Created By		
1	Ciocci Lou & Janet	10031	10031	12000.00		11000.00	33500.00	<input type="checkbox"/>	Creating	10/28/2009	11/4/2009	Large Renovation	Joe
2	Walsh John & Suzanne	10032	10032				1500.00	<input type="checkbox"/>	Submitted	11/1/2009	11/15/2009		Joe
3	Ainsworth, Sally	10033	10033				4500.00	<input type="checkbox"/>	Submitted	11/1/2009	11/15/2009		John
4	Ramirez Ken & Paula	10034	10034			1500.00	5500.00	<input type="checkbox"/>	Submitted	11/1/2009	11/15/2009		John

Form Letters

Collection Letters

To send collection letters to customer first activate the Yellow and Red automatic marking for you accounts. This will automatically color your accounts in the account list on the Main Menu based on their payment history. Slow paying accounts can be marked with Yellow and Delinquent account can be marked with Red.

To set this, go to General Setup.

BILLMASTER II - Main Menu

Company Select | ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | Descriptions | Estimates | **Email / More / Other** | Reports | Routes | Trans / Pymts | Util / Help

Email Setup | Send Single E-Mail | Create Expense File | Add to List | Print Labels, Envelopes | Collection Letters | Click below to scan
 E-Mail Log | Send Broadcast E-Mail | \$ Expenses | Update Balance | Pre Pay Letters
 Email Setup / Other | Email Functions | Expense Tracking | Other | Labels | Form Letters

Quick Pick | Route | Inactive | Excel | Dash | Calc | SndTst | Refresh Bal | Clear 1 | Select All | Clear 2 | Range | Review | Prt Rte Cal | Del Rng | Excel 2

	Menu Name	Group 1	Balance	Phone 1	Street	City
1	(Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2	Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3	Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4	Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5	Alan Rich		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6	Alan Slusher		0.00	111-222-3333	800 Delany Woods	Nicholasville
7	Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8	Alex Davenport		0.00	111-222-3333		
9	Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10	Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11	Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12	Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13	Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14	Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15	Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16	Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17	Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown

Menu Name | Group 1 | Balance | Phone 1 | Street | City

1 | Ally & Jeremy Barnett

2 | Albert Plunkett

1. Check to highlight Yellow and Red accounts status
2. Set the dollar amount for customers to be Yellow and Red. This example shows customers \$100 30 days overdue or more will be Yellow. Customers Owing \$500 or more after 30 days are marked Red.

General Settings

OK Exit System Key and Color Settings General PW Admin 01 PW Expense PW Reports PW

Grid Filters and Options

☒ Round up Sales Tax ☒ Show Only Accounts Found from Search Box

☐ Multiple Users (running on Network) ☒ Include Customer No. in Search

☐ Disable Auto Size Grid Columns ☒ Auto Refresh Balance

Search Found Limit ☒ Display Account with Alert Setting as BOLD

☒ Check for duplicate on Range Selection ☐ Display Account Info Popup on Start up

☒ Internet Connection Active ☐ Start Internet Browser on Startup

Select Items to display in the Quick Account Details

☒ A - Menu Name ☒ F - Job Location 1

☐ B - Balance ☒ G - Job Location 2

☒ C - Routes ☒ H - Standard Charges

☒ D - Phone Numbers ☐ I - Site Info

☒ E - Bill To Address ☒ J - Email

☐ K - Last Charge & Pymt

Grid 1 Select items to display in Grid 1 - Per Company

☒ A - Highlight accounts with No Routes in Orange **Note:**

☒ B - Highlight accounts with Status Yellow **These settings are Per Company**

☒ C - Highlight accounts with Status Red

☒ D - Highlight accounts that are Inactive in Blue

☐ E - Upline Accounts that have individual proposals / estimates

F - Custom Display Style

Grid 2 Configuration

☒ A - Grid Active - Accepts Entries

Cheat Sheet Notes (Shown on Fast Info Tab)

!= one
\$= Two
\$more stuff

Grid Account Payment Status

Enter non Zero Amount that if greater than will be true, for payment status.

	30 days Open	60 days Open	90 days Open	120 days Open
Yellow - Late Payer	<input type="text" value="100"/>	<input type="text" value="100"/>	<input type="text" value="100"/>	<input type="text" value="100"/>
Red - Deliquent	<input type="text" value="500"/>	<input type="text" value="500"/>	<input type="text" value="500"/>	<input type="text" value="500"/>

Report Settings

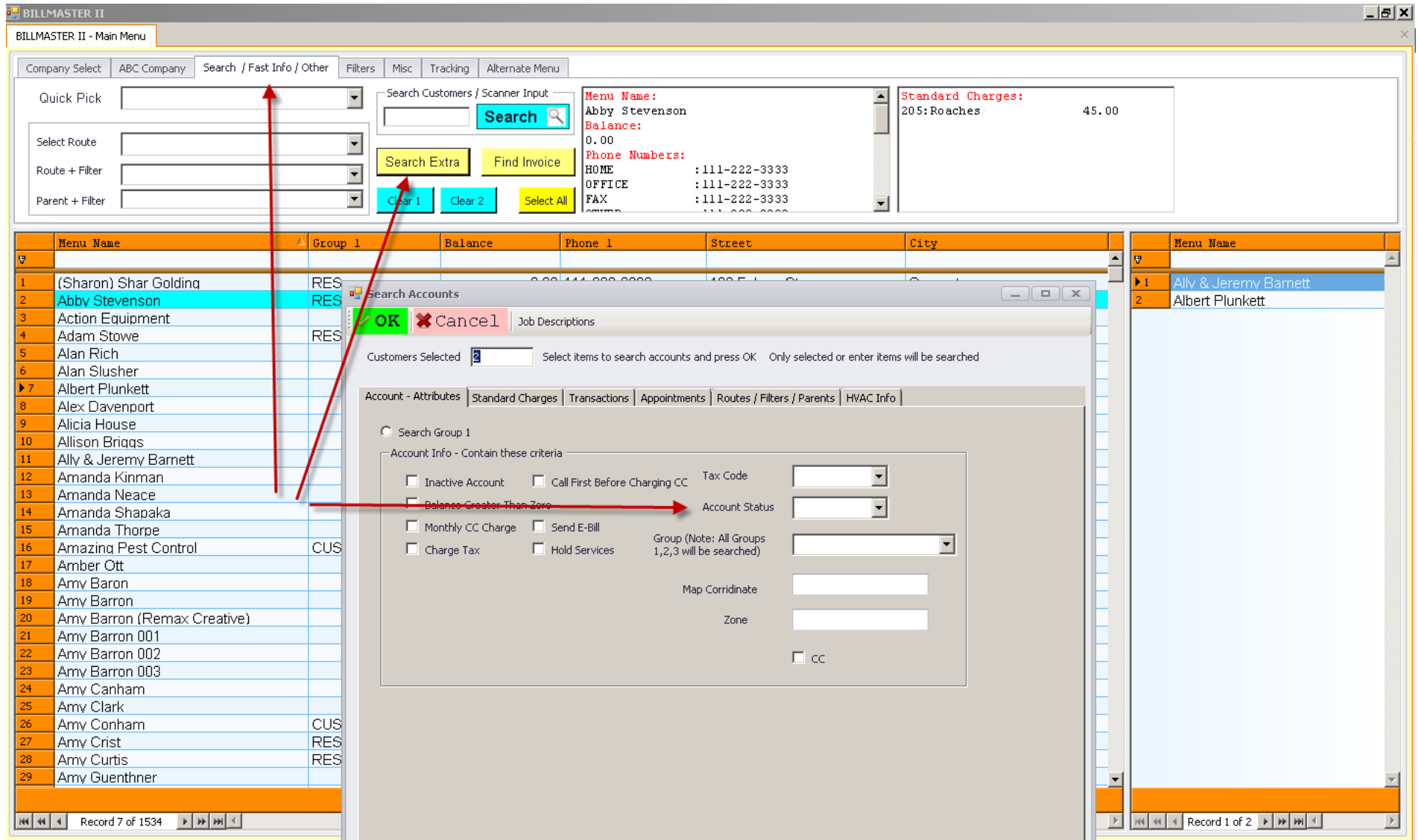
☐ A - Disable Route Name on Balance / Aging Report

☒ B - Ask to show Charts when

C - Bar Chart Style

D - Pie Chart Style

Once the Yellow and Red settings for you accounts are done, then you can print collection letters easily fo the customers you needed to. Use the **Search Extra** button to quick selected the Yellow and or Red Accounts.



Select Collection Letters from the Estimate / More Menu.

BILLMASTER II

BILLMASTER II - Main Menu

Company Select: ABC Company Search / Fast Info / Other Filters Misc Tracking Alternate Menu

Account Bills Calendar Charges Company / Setup Descriptions Estimates **Email / More / Other** Reports Routes Trans / Pymts Util / Help

Email Setup Send Single E-Mail Create Expense File Add to List Print Labels, Envelopes Collection Letters Click below to scan
 E-Mail Log Send Broadcast E-Mail **\$ Expenses** **Update Balance** Pre Pay Letters
 Email Setup / Other Email Functions Expense Tracking Other Labels Form Letters

Quick Pick Route Inactive Excel Dash Calc SndTxt Refresh Ba Clear 1 **Select All** Clear 2 Range Review Prt Rte Cal Del Rng Excel 2

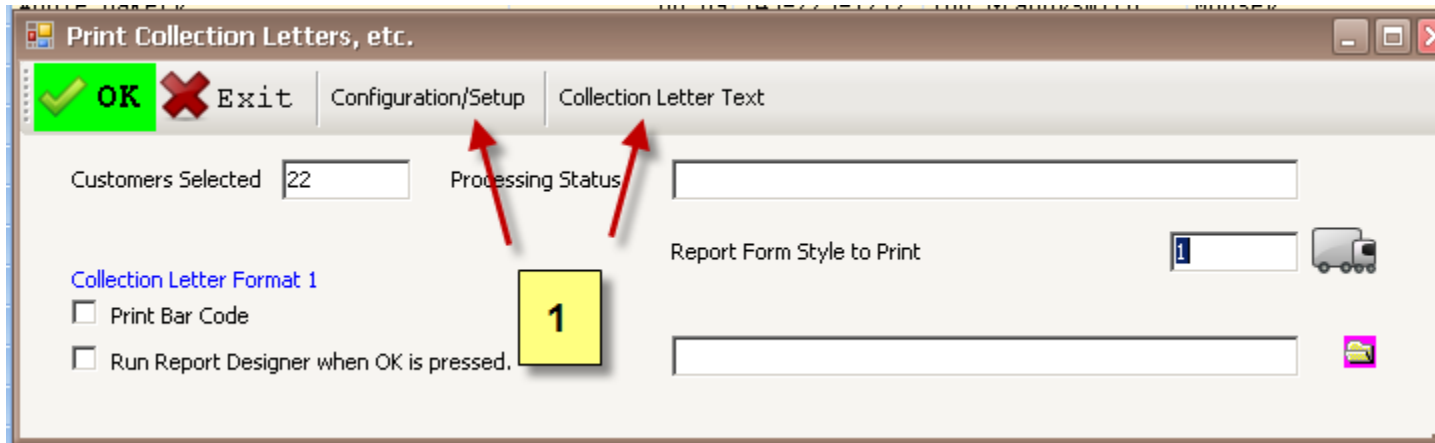
Menu Name	Group 1	Balance	Phone 1	Street	City
1 (Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2 Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3 Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4 Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5 Alan Rich		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6 Alan Slusher		0.00	111-222-3333	600 Delany Woods	Nicholasville
7 Albert Plunkett		0.00	111-222-3333	105 Tim Tam Trail	Georgetown
8 Alex Davenport		0.00	111-222-3333		
9 Alicia House		0.00	111-222-3333	1217 Crumbaugh	Georgetown
10 Allison Briggs		133.75	111-222-3333	109 Copperfield Dr.	Georgetown
11 Ally & Jeremy Barnett		0.00	111-222-3333	3384 Emerson Woods Rd.	Lexington
12 Amanda Kinman		0.00	111-222-3333	401 Highland Ave.	Georgetown
13 Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14 Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15 Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16 Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17 Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18 Amy Davis		0.00	111-222-3333	484 Central Lake Drive	Georgetown

Menu Name

1 Ally & Jeremy Barnett

2 Albert Plunkett

You can configure the salutation used in the Collection letter, by selecting Configuration / Setup.
You can change the text that is used in the collection letter by selecting Collection Letter Text.



Sample Collection Letter

ABC Company

126 Valley Road
Glen Rock, NJ 07452
(845)111-2222 Fax (845)333-4444

Sample Collection Letter

To:

Mr. and Mrs. Andrew Jackson
4787 Oak Street
Mahwah NJ 07430

Job Location:

Mr. and Mrs. Andrew Jackson
569 West 9th Street
Mahwah NJ 07430

Date 01/03/2010

This is a friendly reminder that your account has an overdue payment of \$398.48
We would appreciate your payment of this amount as soon as possible.
If this letter and your payment have crossed, we thank you and apologize for any inconvenience.

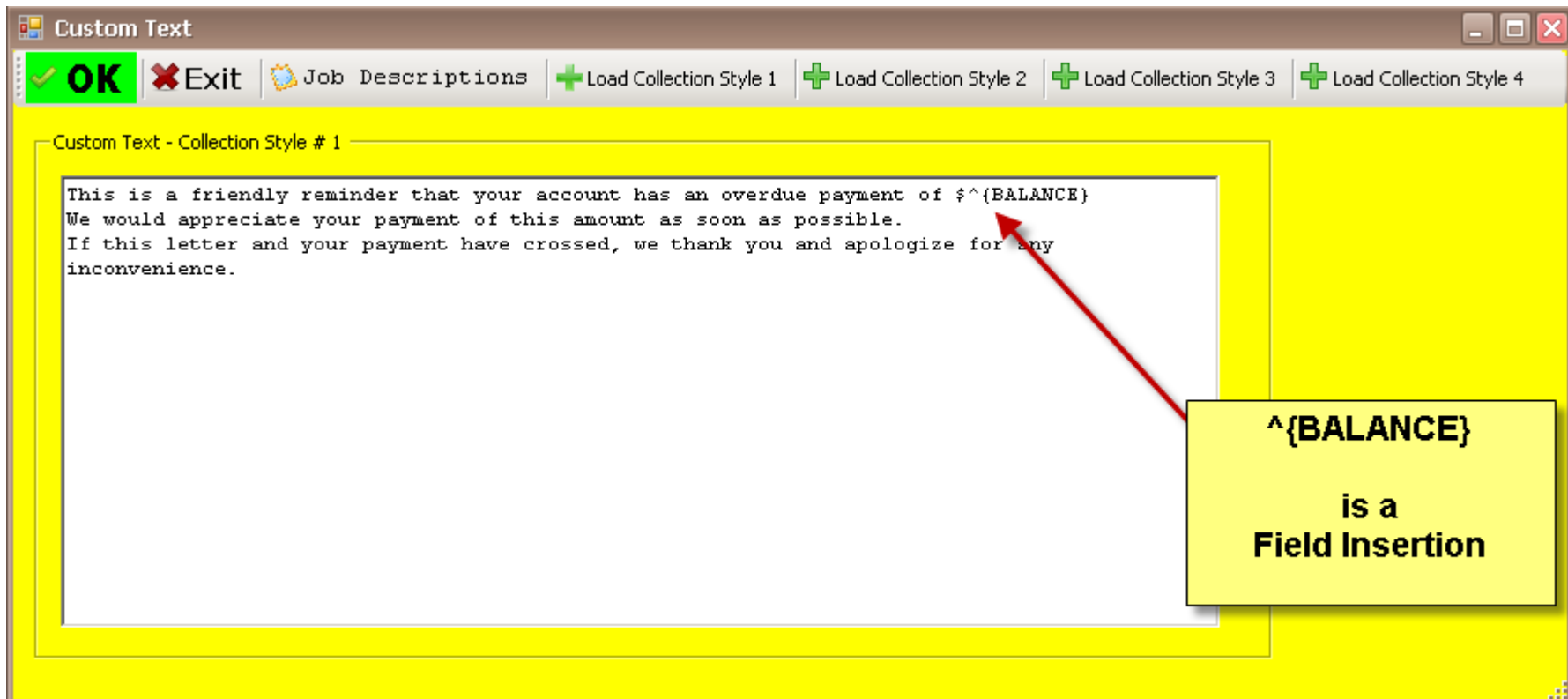
If you want to discuss your account, please call us Monday through Friday, 8a.m. to 5 p.m. You can also reach us by email.

Sincerely,

Letter / Documents - Field Insertions

You can insert customer data into letters automatically and print the individual prices, balances, etc. for customers in Letters and Documents.

Below is a sample of a field insertion from the Collection Letter text. The sample shows how the customer's balance is inserted into the letter when it is printed.



Field Insertion List

The following is a list of insertion fields that can be used in any letter or document.

<u>Field Insertation Format</u>	<u>Output</u>
^{\BALANCE}	Account Balance
^{\CUSTNAME}	Customer Menu Name
^{\CONTACTNAME}	Customer Contact Name
^{\COMPANYNAME}	Your Company Name
^{\COMPADD}	Your Company Address
^{\BILLTO}	Customer Bill To Address
^{\JOBLOC}	Customer Job Location 1 Address
^{\STREET}	Custmer Bill To Street
^{\CITY}	Customer Bill To City
^{\MONTH}	Current Month
^{\DAY}	Current Day
^{\YEAR}	Current Year
^{\DATE}	Current Date
^{\MONTHLONG}	Month spelled out. January, February, March, etc.
^{\ACCTVAL1}	Site Value 1
^{\ACCTVAL2}	Site Value 2
^{\ACCTVAL3}	Site Value 3
^{\ACCTVAL4}	Site Value 4
^101{PRICE}	Customer's price for Job Description 101 (as set in Standard Charges or else in the Job Desription File)
^101{WITHTAX}	Customer's price for Job Description 101 with Sales Tax
^101{TAXONLY}	Customer's price for Job Description 101 only the Sales Tax amount

Field Insertion – Creating Custom Fields

You can create your own field insertion codes. You can total a number of codes and apply discounts to the total and display to your customers. This is commonly used for Pre Payment Letters, Renewal Letters, and Contract Renewals. Select the Print Control menu choice from the Company / Setup Menu.

The screenshot shows the BILLMASTER II Main Menu interface. The 'Comp/Setup' menu is open, and the 'Print Control - Custom Fields' option is highlighted. Red arrows indicate the navigation path: from the 'Comp/Setup' menu to 'Configuraton / Setup', then to 'Print Control - Custom Fields'.

Menu Name

Menu Name	City	Menu Name
1 (Sharon) Shar Golding	Georgetown	1 Ally & Jeremy Barnett
2 Abby Stevenson	Georgetown	2 Albert Plunkett
3 Action Equipment	Georgetown	
4 Adam Stowe	Georgetown	
5 Alan Rich	Georgetown	
6 Alan Slusher	Nicholasville	
7 Albert Plunkett	Georgetown	
8 Alex Davenport	Georgetown	
9 Alicia House	Georgetown	
10 Allison Briggs	Georgetown	
11 Ally & Jeremy Barnett	Georgetown	
12 Amanda Kinman	Georgetown	
13 Amanda Neace	Georgetown	
14 Amanda Shapaka	Catlettsburg	
15 Amanda Thorpe	Georgetown	
16 Amazing Pest Control	Georgetown	
17 Amber Ott	Georgetown	
18 Amy Baron	Georgetown	
19 Amy Barron	Georgetown	
20 Amy Barron (Remax Creative)	Georgetown	
21 Amy Barron 001	Georgetown	
22 Amy Barron 002	Georgetown	
23 Amy Barron 003	Georgetown	
24 Amy Canham	Paris	
25 Amy Clark	Lexington,	
26 Amy Conham	Georgetown	
27 Amy Crist	Georgetown	
28 Amy Curtis	Georgetown	
29 Amy Guenther	Lexington	

Record 7 of 1534

You can create a custom code – up to 10 characters long.

This example shows a MONCOST code. The user wanted to display the total of all services the customer has set up and then divide by the total items to show the cost over a 10 month period. Then you would type ^{MONCOST} in your document text to display the value.

Document Print Control

OK Cancel

Drag a column

Create Customer Field Insertion Field.
Example:
MONCOST

List the Codes that you want to total and divide by.

List what you want to do, this this case divide.

The output will show the price

Name (F)			Code Type
PRICE			PRICE
WITHTAX			WITHTAX
TAXONLY			TAXONLY
DATE			DATE
COMPNAME			COMPNA
PERNAME			PERNAME
STREET			STREET
CSZ			CSZ
JOBLOC			JOBLOC
BILLTO			BILLTO
TOTAL	12 32 33 34 6	ADD	PRICE
MONCOST	12 32 33 34 6	DIVIDE_BY_10	PRICE
TOTFERT	29 29 29 29 29 29 29 29 29 ...	ADD	PRICE
TOTTAX	29 29 29 29 29 29 29 29 29 ...	ADD	TAXONLY

(Company ID)

Record 10 of 20

Edit Filter

Email

Email Setup / Configuration / Usage

To send email bills and proposals to you customers follow these steps:

1. Create a gmail account. If you do not already have gmail account, go to Google and create one. An example would be ABCcompany@gmail.com. Remember to write down your password.
2. Select from the main menu select Estimates/More, E-Mail, Configuration

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | Descriptions | Estimates | **Email / More / Other** | Reports | Routes | Trans / Pymts | Util / Help

Email Setup | Send Single E-Mail | Create Expense File | Add to List | Collection Letters | Click below to scan

E-Mail Configuration

OK Exit E-Mail Log

E-Mail Setup | Credit Card Setup

Settings for All Companies

☒ A - email is Active ☐ B - Send emails high Priority ☐ C - Send E-Bills ☒ D - Send E-Estimates

General Message - E-Mail Settings Per Company

☐ A - Send to BCC (Blind Carbon Copy) for all e-mails
☐ B - Append Signature to all e-mails

D - BCC email Address:

E - Signature:

Company e-mail address: ABC@bellsouth.net

☐ Test E-Mail - Send to company e-mail address
☒ Send Backup Notification to company e-mail

H - Attachments (For Broadcast Email)

Appointment Reminder

☐ Activate e-mail Reminders | Number of days prior to send e-mail for appointment reminder: | Date last time appointment reminders were sent:

E-Mail System Settings (gmail account recommended)

A - From email address: ABCpestcontrol@gmail.com | **Send test e-mail**
 B - Password: *****
 C - SMTP Client: smtp.gmail.com
 D - SMTP Port: 587 ☐ D - Alternate E-mail Method
 E - Reply To Address:

SMTP Listing

Google - smtp.gmail.com	Port: 587
Yahoo - smtp.mail.yahoo.com	Port: 465
Optimum - smtp.optimum.net	Port: 587
Hotmail - smtp.live.com	Port: 587
AOL - smtp.aim.com	Port: 587
Verizon - outgoing.verizon.net	
MSN - smtp.live.com	Port: 587

Common Insert Field Examples

Bill to: Mr. Smith for October 2009
 Bill to: ^{CUSTNAME} for ^{MONTHLONG} ^{YEAR}

Billing | Estimates / Proposals | Pymt Rcvd | Alerts | Appt Reminder | Broadcast | Trans Per Acct | Collection Letters | Open Invoices

Subject: Bill to: ^{CUSTNAME} for ^{MONTHLONG} ^{YEAR}

Message: Thank you for your business ^{COMPADD}

☐ e-mail bills with an amount due of ZERO

Zero Message: Thank you for your business.

☐ e-mail bills with an amount due of ZERO only if contains charges & credits

Greater than Zero Message: Please pay from the attached Invoice / Statement

Email Configuration

Check the settings for A-email is Active, C-To Send E-mails and D-Send Estimates. Also review the settings if you want to automatically send Yourself a copy of invoices that were send. By Checking option B.

Enter your email address and password on the right.

Enter the Subject and Message for you bills, so it automatically puts the customer name and any message you need such as

Subject: Bill to Mr. Smith for October 2010

Message: Mr. Smith

Please pay from the attached invoice.

Thank you for your business.

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | Descriptions | Estimates | Email / More / Other | **Reports** | Routes | Trans / Pymts | Util / Help

Email Setup | Send Single E-Mail | Create Expense File | Add to List | Collection Letters | Click below to scan

E-Mail Configuration

OK | Exit | E-Mail Log

E-Mail Setup | Credit Card Setup

Settings for All Companies

☒ A - email is Active ☐ B - Send emails high Priority ☐ C - Send E-Bills ☒ D - Send E-Estimates

General Message - E-Mail Settings Per Company

☐ A - Send to BCC (Blind Carbon Copy) for all e-mails

☐ B - Append Signature to all e-mails

D - BCC email Address: _____

E - Signature: _____

Company e-mail address: ABC@bellsouth.net

☐ Test E-Mail - Send to company e-mail address

☒ Send Backup Notification to company e-mail

H - Attachments (For Broadcast Email)

Appointment Reminder

☐ Activate e-mail Reminders

Number of days prior to send e-mail for appointment reminder: _____

Date last time appointment reminders were sent: _____

E-Mail System Settings (gmail account recommended)

A - From email address: ABCpestcontrol@gmail.com

B - Password: *****

C - SMTP Client: smtp.gmail.com

D - SMTP Port: 587 ☐ D - Alternate E-mail Method

E - Reply To Address: _____

Send test e-mail

SMTP Listing

Google - smtp.gmail.com	Port: 587
Yahoo - smtp.mail.yahoo.com	Port: 465
Optimum - smtp.optimum.net	Port: 587
Hotmail - smtp.live.com	Port: 587
AOL - smtp.aim.com	Port: 587
Verizon - outgoing.verizon.net	Port: 587
MSN - smtp.live.com	Port: 587

Common Insert Field Examples

Bill to: Mr. Smith for October 2009

Bill to: ^{CUSTNAME} for ^{MONTHLONG} ^{YEAR}

Billing | Estimates / Proposals | Pymt Rcvd | Alerts | Appt Reminder | Broadcast | Trans Per Acct | Collection Letters | Open Invoices

Subject: Bill to: ^{CUSTNAME} for ^{MONTHLONG} ^{YEAR}

Message: Thank you for your business ^{COMPADD}

☐ e-mail bills with an amount due of ZERO

Zero Message: Thank you for your business.

☐ e-mail bills with an amount due of ZERO only if contains charges & credits

Greater than Zero Message: Please pay from the attached Invoice / Statement

Email Configuration for Account

Able, Andy

Fast Keys | Setup / Chemical / WDI / Other | Documents

1 of 1

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info | Comments / Memo

Menu Name:

Letter: Customer Code: Group / Type 1:

Status: Group / Type 2:

Current Balance:

☒ Apply Service Charge if needed?
 ☐ Inactive Account
 ☐ Alert
 ☐ Wor

☒ Charge Taxes?
 ☒ Send Paper
 ☐ Contact
 ☐ Sal

Tax Defaults:
☒ Send e-Bill
 ☐ Vendor
 ☐ Fre

☐ Option 1
 ☐ Estimate
 ☐ Tar

☐ No Label/Mailer
 ☐ Bulk
 ☐ Rte

Check Send E-Bill

Bill To:

Standard Charges

Code	Description
6	Weekly Maint...

Able, Andy

Fast Keys | Setup / Chemical / WDI / Other | Documents

1 of 1

Menu Name / Taxes / Filters | Contact / e-mail / CC Info | Site Info | Comments / Memo

Contact Name: Referred By:

Name on CC:

Card Type:

Credit Card No: SC

Enter e-mail address of customer

e-mail address 1: ☒ Verified

e-mail address 2: ☐ Verified

Email Configuration for Billing

Produce Bills

OK Exit Billing Settings Service Charge Settings Bill Print Settings **Watermark Settings**

Customers Selected: 1 Processing Status: Watermark Settings

Billing Dates

A - Start of Billing Period: 8/1/2010

B - End of Billing Period: 03/31/2010

C - Date Appearing on Bill: 03/26/2010

D - Due Date: 03/26/2010

E - Print bills with a balance due of \$ X.XX or more: -9999.00

8.5 x 11.0 - Job Loc on Bottom, 4" bottom tear off

F - Invoice Form No. to Print: 4

G - Next Invoice Number to Print: 10270

Custom Print Style will print if filed in below.

☐ Run Report Designer when OK is pressed.

☒ H - Use Job Location if address is different. No will always print advertisement.

☒ I - Print as statement? No will always print without PAYMENTS and PREVIOUS BALANCE ☐ Print Previous Balance if printing a Invoice

☐ J - Apply Service Charge if necessary (see Service Charge Settings)

K - Company Address to Use: 0 0 = default Address, 1 = 2nd Company Address, etc.

L - Advertisement Text: *** Ask about our Pre Pay Discounts ***

☐ Overwrite default message

Print for Codes

N - Print only these codes:

OR

O - Print all codes EXCEPT these codes:

M - Print only this invoice number:

☐ P - Print all unpaid transactions ☐ 0 - Print from last payment

Select Watermark Settings

Watermark Settings

Save Exit Restore Default Settings

Preview Sample

Preview Sample
Sample Te

Text Color
BLACK

Select Color

- NAVY
- BLUE
- DODGER BLUE
- CYAN
- SKY BLUE
- DARK ORANGE
- ORANGE
- DARK GREEN
- GREEN
- LIME
- GOLD
- KHAKI

Font Style and Size

Arial Size 28

Regular Bold Italic

Text Transparency 0=Dark 255=Transparent 150

Watermark Text - Sample Display

Regular Text Sample Text

Past Due Text - Warning Sample Text

Past Due Text - Delquent Sample Text

Regular Text

EMAIL Text

Sent via Email

Warning Text

Delquent Text

Enter text for watermark to identify if bill was send via email

Bill output

ABC Company
 126 Valley Road
 Glen Rock, NJ 07452
 (845)111-2222 Fax (845)333-4444

03/26/10

Andy Able
 Monsey NY 10952

Inv No.	Billing Period		DUE DATE
10258	3/1/2010	03/31/2010	03/26/2010
ACCOUNT SUMMARY as of			03/26/2010
Previous Balance			0.00
Payments			0.00
Current Charges			386.00
Taxes			27.02
Sub Total			413.02
TOTAL AMOUNT DUE			413.02



Home 745-348-4888

Job Location

Andy Able , Monsey NY 10952

DATE	DESCRIPTION	AMOUNT
03/24/10	Monthly Service	413.02

Sent via Email

 Please detach and return bottom portion with payment. Retain the top portion for your records

PLEASE RETURN TEAR OFF WITH PAYMENT

Andy Able

Sending Email

Email Message

Enter Subject and Message to be send to customers with their Bill

Sample Subject Line:
Bill to: ^{CUSTNAME} for ^{MONTHLONG} ^{YEAR}

Subject
Bill to: ^{CUSTNAME} for ^{MONTHLONG} ^{YEAR}

Message
^{CUSTNAME},
Please pay from the attached invoice.
Thank your for your business.
Customized Business Software, LLC
BILLMASTER
233 Rock Road, #324

Alter EMail Message if needed

Review / Modify and Press OK to Send emails

OK Cancel Select All Rows Delete Selected Rows

Drag a column header here to group by that column

Menu Name	Sent	Subject	Message	email To	CC	BCC	Attach 1
Able, Andy	03/26/2010	Bill to: Andy Able for March 2010	Andy Able,	sales@billmaster.info			c:/bny/email/Andy Able_2010_03_26.bill.pdf
Ainsworth, Sally	03/26/2010	Bill to: Ms. Sally Ainsworth for March 2010	Ms. Sally Ainsworth,	support@billmasternow.com			c:/bny/email/Ms. Sally Ainsworth_2010_03_26.bill.pdf
Anderson Ken & Emma	03/26/2010	Bill to: Mr & Mrs Ken Anderson for March 2010	Mr & Mrs Ken Anderson,	support@billmaster.info			c:/bny/email/Mr & Mrs Ken Anderson_2010_03_26.bill.pdf
Andrew, Jackson	03/26/2010	Bill to: Mr. and Mrs. Andrew Jackson for March 2010	Mr. and Mrs. Andrew Jackson,	support@customizedBusinessSoftware.com			c:/bny/email/Mr. and Mrs. Andrew Jackson_2010_03_26.bill.pdf
Apple Bakery	03/26/2010	Bill to: Mr. Johnny Appleseed for March 2010	Mr. Johnny Appleseed,	AppleBakery@aol.com			c:/bny/email/Mr. Johnny Appleseed_2010_03_26.bill.pdf
Bill Listing	03/26/2010	Bill Listing_2010_03_26_Time_07_51_31	Bill Listing_2010_03_26_Time_07_51_31			support@billmasternow.com	c:/bny/email/Bill_Listing_2010_03_26_Time_07_51_25.bill.pdf

Review the emails to be sent.
Note the last line shows a copy of all invoices sent will be sent to you.

Press OK to send the e-mails. Wait for the process to complete.

Bar Code Scanner Setup



233 Rock Road, #324
Glen Rock, NJ 07452
(201) 620-8566 Fax (201) 301-7306
www.billmaster.info

Enclosed is your Bar Code Scanner. By scanning the barcodes on paper produced by BILLMASTER you can dramatically reduce the amount of typing and increase productivity. Simply point and shoot.

1. Your scanner is already preset; simply plug it into your USB port. If you need to reset it, the Barcode setup is print on the last0 page.
 2. To turn on barcode print on your bills. When printing bills press Billing Settings, and check Option N – Print Barcodes on bills.
- Then you will see the barcode print on your bills.

Billing Settings

Press Print Bills
Press Billing Settings
Check Option N

Billing Settings for All Companies

☐ Use Invoice numbers for ALL Companies Next Invoice Number 3699

☒ A- Print bills with a zero balance?

☐ B - Use Job Location if address is different. No will always print message.

☒ C- Do not print transaction amounts as Zero (0.00) . Print BLANK for the amount instead.

☒ D - Use Today's Date for Date Appearing on Bill

☐ E - Used Today's Date for Due Date

☐ F - If payments equal previous Balance do not show payments and make previous balance zero

☒ G - Print as statement (show payments and previous balance)

☒ H - Calculate total remaining balance for bill

I - Enter Minimum Balance amount to print bills. -99999.00

J - Description for transactions on bill

☒ K - Add Bill Listing after printing

L - Option 1 Next Invoice Number 500000

☐ M - Use separate invoice numbering for Option 1

☒ N - Print Barcodes on bills

☐ O - Apply Service Charge if necessary. (Note account must be checked to apply service charge)

☐ P - Print the word "STATEMENT" or "INVOICE" on the bill, based on option G

☐ Q - Print Account No. on Bills

☐ R - Print "Upon Receipt" if Due Date is blank

☐ S - Print one phone number on bill

Billing Settings Per Company

A1 - Company Address to Use 0 0 = default Address, 1 = 2nd Company Address, etc.

B1 - Option 1 Company Address 1 0 = default Address, 1 = 2nd Company Address, etc.

C1 - Message on Invoice / Bills

Updates are posted regularly to our website at www.BillmasterNow.com
Press the ABOUT button at the top of the screen to see if a more recent version is available. If you need help loading the update, please let us know and we can help you.

Provide us with your e-mail address and let us know if you wish to receive invoices via e-mail and on nonerless!

D1 - Terms on Bottom of Bill / Invoice Thank you for selecting BILLMASTER. OFFICE: (201) 620-8566

E1 - Bill Description Label

To use the scanner. Start with Billmaster on the Main Menu.
Scan the Barcode. BILLMASTER will automatically switch to the correct company.

If you have any questions please let us know, we are happy to help.

BILLMASTER II - Main Menu

Company Select: ABC Company | Search / Fast Info / Other | Filters | Misc | Tracking | Alternate Menu

Account | Bills | Calendar | Charges | Company / Setup | Descriptions | Estimates | Email / More / Other | **Reports** | Routes | Trans / Pymts | Util / Help

F2 - Review / Modify
 Create New Account | Standard Charges | Notes | Delete Account | Copy (Duplicate) Account | Standard Charge Updates | Click below to scan
 Transactions | Individual Price for Services | Account Notes | Delete Account | Copy Accounts to Another Company | Update Periodic Schedule
 Account | Individual Price for Services | Account Notes | Delete Account | Copy Functions | Updates

Quick Pick | Route | Inactive | Excel | Dash | Calc | SndTst | Refresh Bal | Clear 1 | Select All | Clear 2 | Range | Review | Prt Rte Cal | Del Rng | Excel 2

	Menu Name	Group 1	Balance	Phone 1	Street	City
1	(Sharon) Shar Golding	RES	0.00	111-222-3333	100 Falcon Ct.	Georgetown
2	Abby Stevenson	RES	0.00	111-222-3333	152 Robin Rd.	Georgetown
3	Action Equipment		0.00	111-222-3333	109 Demand Ct.	Georgetown
4	Adam Stowe	RES	0.00	111-222-3333	115 Ridgeview Dr.	Georgetown
5	Alan Rich		0.00	111-222-3333	187 Lakeshore Dr.	Georgetown
6	Alan Slusher		0.00	111-222-3333	800 Delany Woods	Nicholasville
7	Albert Plunkett		0.00			Georgetown
8	Alex Davenport		0.00			
9	Alicia House		0.00			Georgetown
10	Allison Briggs		133.75			Georgetown
11	Ally & Jeremy Barnett		0.00			Lexington
12	Amanda Kinman		0.00			Georgetown
13	Amanda Neace		0.00	111-222-3333	1338 Fairfax Way	Georgetown
14	Amanda Shapaka		0.00	111-222-3333	10836 Cedar Dr.	Catlettsburg
15	Amanda Thorpe		100.00	111-222-3333	173 Keelridge Dr.	Georgetown
16	Amazing Pest Control	CUST	0.00	111-222-3333	822 Palisade Ave.	Teaneck
17	Amber Ott		0.00	111-222-3333	202 Paynes Landing	Georgetown
18	Amy Baron		0.00	111-222-3333	481 General John Payne	Georgetown
19	Amy Barron		0.00	111-222-3333	102 Summerridge Way	Georgetown
20	Amy Barron (Remax Creative)		0.00	111-222-3333	128 Edwards Dr.	Georgetown
21	Amy Barron 001		0.00	111-222-3333	198 Victoria Way	Georgetown
22	Amy Barron 002		0.00	111-222-3333	128 Edwards Dr.	Georgetown
23	Amy Barron 003		0.00	111-222-3333	128 Edwards Ave	Georgetown
24	Amy Canham		0.00	111-222-3333	850 Steele Ford Rd.	Paris
25	Amy Clark		0.00	111-222-3333	2125 Call Dr.	Lexington,
26	Amy Conham	CUST	0.00	111-222-3333	111 Hiwatha Tr. #22	Georgetown
27	Amy Crist	RES	0.00	111-222-3333	120 Sunningdale Dr.	Georgetown
28	Amy Curtis	RES	0.00	111-222-3333	114 Redding Rd.	Georgetown
29	Amy Guenther		0.00	502-868-0902	43 Richmond Ave.	Lexington

Record 7 of 1534 | 29239.59

Record 1 of 2

Use the barcode reader and scan each barcode in the order shown.

1



2



3



4



5



6



Customized Business Software, LLC – BILLMASTER License Agreement

This is an agreement between you, the end user, and us, Customized Business Software, LLC. By opening the sealed package, you are agreeing to be bound by the terms of this agreement. If you do not agree to these terms, do not use this software and promptly return the unopened disk package and all accompanying materials to us for a refund.

Software License

- 1. LICENSE.** As a result of your payment of the license fee, which is included in the price you paid for this product, Customized Business Software as Licensor, grants to you, the Licensee, a nonexclusive license to use and display this copy of a Customized Business Software software program (the "Software") on one computer. Customized Business Software reserves all rights not expressly granted to Licensee under this License.
- 2. COPYRIGHT.** The Software is owned by us and is protected by the United States copyright laws and international treaty provisions. You must treat the Software like any other copyrighted material, such as a book or musical recording. You may, however, either (a) make one copy of the Software to a single hard disk, provided you keep the original solely for backup or archival purposes. You may not copy any written materials accompanying the Software.
- 3. OTHER RESTRICTIONS.** You may not rent or lease the Software, but you may transfer it and accompanying written materials on a permanent basis provided you retain no copies and the recipient agrees to the terms of this agreement. You may not reverse engineer, decompile, or disassemble the Software.

Limited Warranty on Software

- 4. LIMITED WARRANTY.** We warrant that the Software will perform substantially in accordance with the accompanying written materials for a period of 30 days from the date of receipt. Any implied warranties on the Software are limited to 30 days. Some states do not allow limitations on duration of an implied warranty, so this limitation may not apply to you.
- 5. REMEDIES.** Our entire liability and your exclusive remedy shall be, at our option, either (a) return of the price paid or (b) replacement of the Software that does meet our limited warranty and that is returned to us with a copy of your receipt. Our limited warranty is void if failure of the Software has resulted from abuse or misapplication. We warrant the replacement Software under this limited warranty for the remainder of the original warranty period or 30 days, whichever is longer.
- 6. NO OTHER WARRANTIES.** WE DISCLAIM ALL OTHER EXPRESS OR IMPLIED WARRANTIES, INCLUDING THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. OUR LIMITED WARRANTY GIVES YOU SPECIFIC LEGAL RIGHTS. YOU MAY HAVE OTHER RIGHTS, WHICH VARY FROM STATE TO STATE.
- 7. LIMITATION OF LIABILITY.** In no event shall Customized Business Software or any other party who has been involved in the creation, production or delivery of the Software be liable for any indirect, special or consequential damages, whether resulting from defects in the diskette or media, or arising out of this license, or resulting from the use, the inability to use, the results of use, the documentation or performance, including loss of profits, arising out of the use or inability to use the Software, even if we have been advised in advance of the possibility of such damages. Because some states do not allow the exclusion or limitation of liability for consequential or incidental damages, this limitation may not apply to you.
- 5. GENERAL.** If any provision of this License is invalid or unenforceable, all other provisions shall remain valid and enforceable. This License constitutes the complete and exclusive agreement of the parties, and supersedes any other agreements or discussions between Customized Business Software LLC regarding the Software or any other items included in this package.

US. Government Rights

The Software and documentation are provided with RESTRICTED RIGHTS. Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(iii) of the Rights in Technical Data and Computer Software clause at 52.227-7013. The contractor / manufacturer is Customized Business Software LLC, 233 Rock Road, #324, Glen Rock, NJ 07452.

Index

Account Screen Style.....	39	VIDEO – Account Review – Pest Control.....	39
<u>Accounts Receivable</u>	143	VIDEO – Account Review 01.....	39
Adding Images and Pictures.....	60	VIDEO – Add to Route based on distance.....	95
Backup	132	VIDEO – Adjusting the print for a Invoice.....	80
Balance Forward	67	VIDEO – Applying Charges to Accounts	70
Bar Code Scanner Setup	175	VIDEO – Calendar Scheduling	112, 128
Billing period	80	VIDEO – Change Main Menu Style	29
Charges	68	VIDEO – Change Route Order	95
Service	67	VIDEO – Contracts and Renewal Letters	138
Charging your customer	62	VIDEO – Create a Route	94
Code	67	VIDEO - Create Account	12
Create Account – Pest Control.....	13	VIDEO - Create Account – Pest Control	13
<u>Deductible Expense</u>	143	VIDEO – Create General Estimate / Proposal	138
Delete Transactions.....	18	VIDEO – Custom Dashboard.....	29
EMAIL.....	167	VIDEO – Delete Transactions	64
Enter Payments / Checks.....	18	VIDEO – Enter Batch Payments.....	78
<u>Expenses</u>	143	VIDEO – Enter Single Payment.....	77
Fast Account Info Setup.....	27	VIDEO – Fast Invoice	62
Google Maps / Maps.....	30	VIDEO – Find Invoice.....	62
Help.....	146	VIDEO – Invoice Registry.....	62
Help Button.....	16	VIDEO – Main Color Setup.....	29
Inactive Account	35	VIDEO – Main Menu Navigation.....	16
Job Description File	9, 66	VIDEO – Pest Control Scheduling / Billing	112
Map / Web	30	VIDEO – Print Routes	96
<u>Non-tax codes</u>	67	VIDEO – Printing a Invoice.....	82
Payments.....	68	VIDEO - Produce Bills / Invoices.....	80
Total to check deposits.....	124	VIDEO – Report Designer.....	122
Payments / Deposit Listing	124	VIDEO – Reports – Aging Report	122
Payments for charges without Tax	67	VIDEO – Reports - Balance Summary	122
Pre-Paid Accounts	81	VIDEO – Reports – Company Totals	126
Sales Tax.....	133	VIDEO – Reports – Name and Address.....	127
Scanner Setup.....	175	VIDEO – Reports – Payment Listing	124
Search Extra.....	19	VIDEO – Reports – Print Transaction File Report	125
Security	137	VIDEO – Reports – Work Completed Report	125
Standard Charges	17	VIDEO – Schedule Monthly & Every 2 Weeks.....	112
Support.....	146	VIDEO – Schedule Quarterly Service	112
Type	67	VIDEO – Standard Charges.....	36
Version Information.....	16	VIDEO – Transactions.....	14
VIDEO - Account Create	33	VIDEO – Transactions / Invoices	62
VIDEO – Account Create – Pest Control.....	33		